CardVisor® ID Scanner

Software User Manual

AGE VERIFICATION APPLICATION

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www.CardVisor.com , www.IDVisor.com, www.IDScanner.com (Product Web site)

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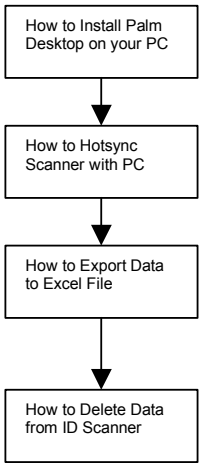
About This Document

Thank you for becoming a TokenWorks customer. We appreciate your business and we are happy to help you get the most value from our products.

First, we recommend that you print this document, place it in a 3-ring binder, and keep it handy with your other business operations manuals. That way, you will have a hardcopy where you can write any notes needed for your particular business.

This document tells you:

- How to install the Palm Desktop software on your PC so you can *import* data from your ID Scanner.
- How to *export* data from the Palm Desktop to an Excel compatible file.
- How to *delete* data from your ID Scanner and synchronize it with your computer.
- How to troubleshoot any unexpected synchronization situations you may encounter.


How to Install Palm Desktop on your PC
How to Hotsync Scanner with PC
How to Export Data to Excel File
How to Delete Data from ID Scanner

For success with this documentation, all you need to do is follow the checklist instructions, step-by-step. If you should encounter problems with synchronizing your PC and the ID Scanner, you will find step-by-step troubleshooting procedures in the Appendix.

Document Format

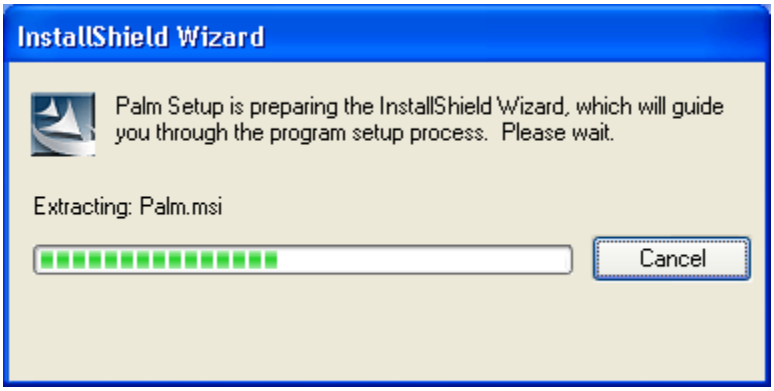
We formatted this document with 1-½ spaces between lines to leave room for you to write notes or personal reminders. We also provided all necessary screenshots so you'll know what to look for as you go along. It takes a few more pages to provide this format, but the clarity is worth every penny – and you won't strain your eyes on fine print and tiny screenshots.

The Acrobat PDF file includes bookmark navigation, active links to cross-reference parts of the document, plus active links to the Internet.

Each step-by-step instruction starts with "___" on the left-hand side as shown below**.** Indented under each step, you will typically find supporting information plus screenshots of dialog boxes that apply to that step. Here's an *example* of how the checklist format is laid out (don't take this step now):

___ Insert the Orange Palm Z22 CD into your PC's CD drive.

This version of the Palm Desktop software will *(... comments and information as required for this step ...).* When you insert the Orange CD, your PC will launch the installation screens below.


InstallShield Wizard
Palm Setup is preparing the InstallShield Wizard, which will guide you through the program setup process. Please wait.
Extracting: Palm.msi
Cancel

(... more information and screenshots as required for this step ...)

___ (Next step.)

(... information and screenshots as required for this step ...)

___ (Next step.)

(... etc. ...)

Using the checklist format shown above, we have attempted to include all necessary steps, even the "obvious" steps, to help those who might be new to computer experience. However, we assume that you know such things as how to:

- Use your PC or Mac operating system
- Navigate your computer's file system
- Surf the Internet
- Download software from the Internet (if required)

IDVisor Scanner Hardware

The *IDVisor Scanner* is the hardware that *scans* ID cards; it referred to herein as the "ID Scanner." The IDVisor Scanner comes in several models as shown to the right.

	IDVisor Z22 Mobile		IDVisor Z22 CounterTop
	IDVisor Z22 MSR		IDVisor Deluxe (or CardVisor I, II, III, IV)
	CardVisor I, II, III, IV - BC		CardVisor I, II, III, IV - BC Pro
	Cardvisor I, II, III, IV - BC Edge		

CardVisor Software

Each model of the *IDVisor Scanner* runs some version of the *CardVisor Software*, which comes in different versions as follows:

The *CardVisor Software* is provided as a basic version with optional upgrades as follows:

1. *CardVisor II* Basic Package,
2. *CardVisor III* Upgrade to VIP/Banned List Database,
3. *CardVisor IV* Upgrade Anti Pass-Back Alarm (detects more than 1 card scan on the same ID per evening, intended to tell you when someone passes back their ID to someone else in line).

All IDVisor Scanners ID Scanners have been preloaded with CardVisor Software. Therefore, you don't need to install software on your PC to operate the IDVisor Scanners. (If that software has been accidentally erased or compromised, see **How to Reinstall the CardVisor Software** for instructions on how to reinstall the software).

However, you must install software on your PC to download the scan-transactions from your ID Scanner. Thus, you will use the Orange Palm CD to install the Palm Desktop software on your PC.

Later, you will run this Palm Desktop software to download your customer data from your ID Scanner.

Note: Some customers choose not to download scan-transaction data because the scanner automatically manages the last 6000 or 9000 scans by overwriting the oldest scans. These

customers choose to wait until an external event such as law enforcement requests a copy of the transaction data.

The White CardVisor CD contains user documentation plus utilities you will use to create your VIP/Banned lists if you have the upgrade to CardVisor III or IV Software. If you have the VIP/Banned list software, check this CD for the user manual and PC software used with the VIP/Banned List.

There are several versions of the Palm Desktop. We ship Palm Desktop version 4.14 on the orange CD. For older versions of the Palm Desktop and for Vista installations, visit http://www.idscanner.com/help/HotSyncIssues.htm

Keywords, Definitions, and Jargon

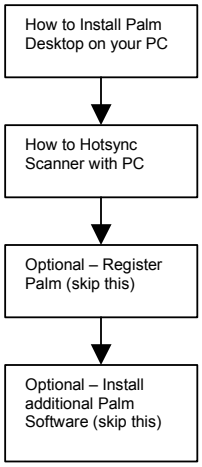
Term	Definition
CardTool® Reader	The CardTool reader is a 3-Track Magnetic Card Reader for the Palm Handspring Visor Handheld computer. It transforms any Handspring Visor into a portable magnetic card reader.
CardVisor Software	Software included with your IDVisor Scanner; see **CardVisor Software** on page **6**.
Delimit	To set the limit of something. Ex: The (^) character delimits (separates) fields, for example: *name^address*
Download	Transfer data *from* the ID Scanner (or Internet) *to* your PC
Help from the TokenWorks website	If you have any problems with your ID Scanner go to our help page at: http://www.idscanner.com/help/ If you have any problems with HotSync, see **HotSync Troubleshooting** and/or check our Help page at: http://www.idscanner.com/help/
HotSync	The process of synchronizing the IDVisor Scanner's data with you PC's data.
HotSync Troubleshooting	If you have any problems with HotSync, see **HotSync Troubleshooting** and/or check our Help pages at: http://www.idscanner.com/help/ and http://www.idscanner.com/help/HotSyncIssues.htm
ID Scanner	Shorthand for the IDVisor Scanner AND its CardVisor Software.
Palm Desktop Application	PC software that communicates with the Palm Device.
PC	Personal Computer. In this manual, PC refers to either a

	Macintosh or PC computer.
PDA	Personal Digital Assistant. A generic term for a small, handheld computer. The Palm devices are often called PDAs.
Troubleshooting	For help with troubleshooting HotSync or your ID Scanner go to our help page at: http://www.idscanner.com/help/
Upload	Transfer data *from* your PC to your ID Scanner (or to the Internet)

Downloading Data from the ID Scanner to a PC

Install Palm Desktop PC Software from Palm

The flowchart to the right shows what you will achieve by following the steps in this section.


How to Install Palm Desktop on your PC
How to Hotsync Scanner with PC
Optional – Register Palm (skip this)
Optional – Install additional Palm Software (skip this)

- Install Palm Desktop software. Here, you install Palm's software for communicating with your ID Scanner.
- Then, you will HotSync your ID Scanner with your computer, which means that the data will match.
- The next two steps are optional (not necessary).

You will use the Palm Desktop Application on the Orange Palm CD to transfer data to/from your PC and your ID Scanner (which is a *Palm* handheld computer). The Palm Desktop application has the same applications found on your ID Scanner.

Your ID Scanner stores card-swipe transactions in the *MemoPad* application.

Also installed with the Palm Desktop is a program called the *HotSync Manager*. When the *HotSync Manager* is running, you will see its icon in the system task tray located in the bottom-right corner of your PC screen. *HotSync Manager* must be running (i.e. displayed in the system tray) to perform a HotSync.

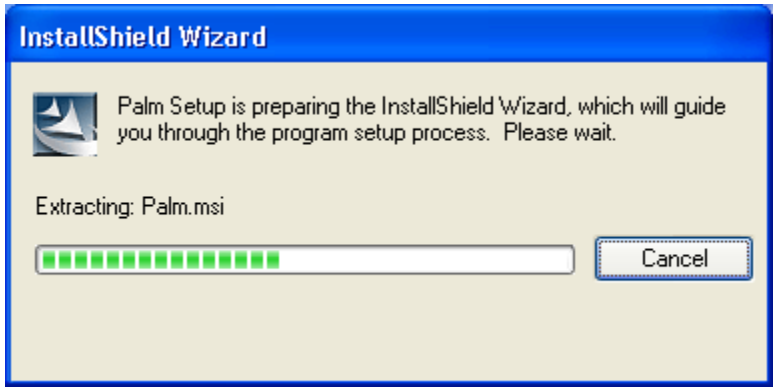
___ Insert the Orange Palm Z22 CD into your PC's CD drive.

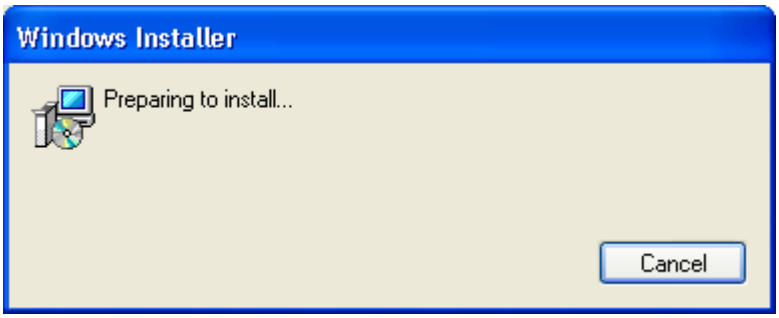
Note: If you have previously installed the Palm Desktop *Version 4.01* for the Handspring Visor that we shipped on a Green CD, please read this.

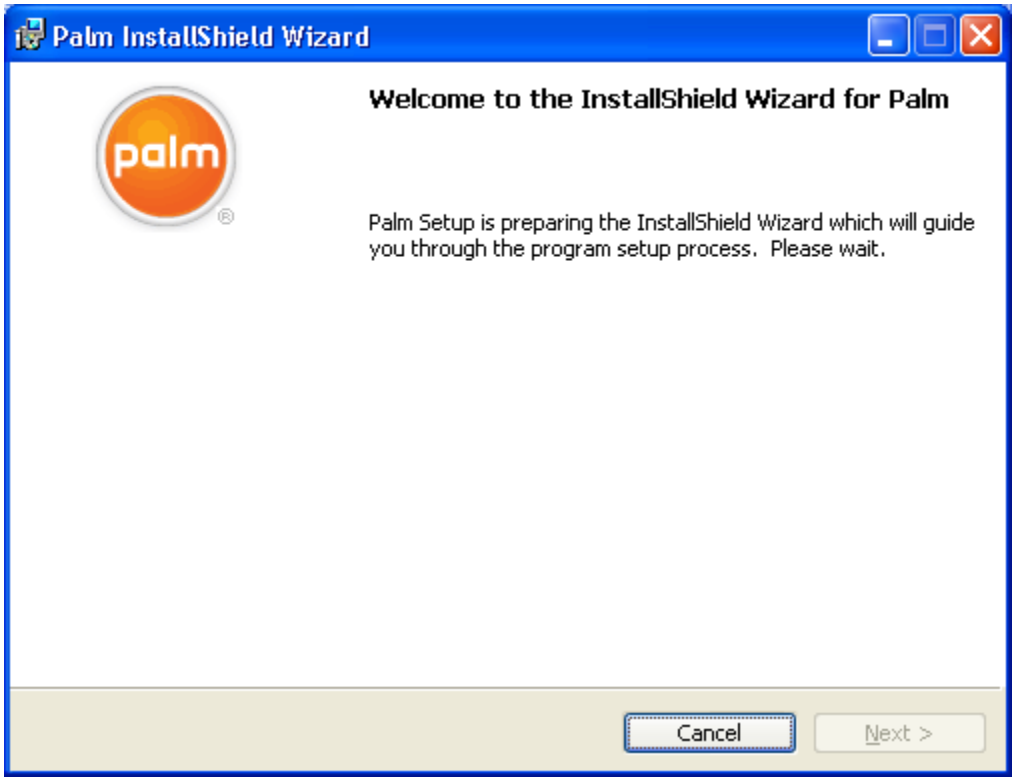
This newer version **4.1.4** of the Palm Desktop software **will overwrite older versions, even if you create a second administrative account**. (In other words, you cannot have both versions running on the same PC.) However, version 4.1.4 *does* support the Handspring Visor.

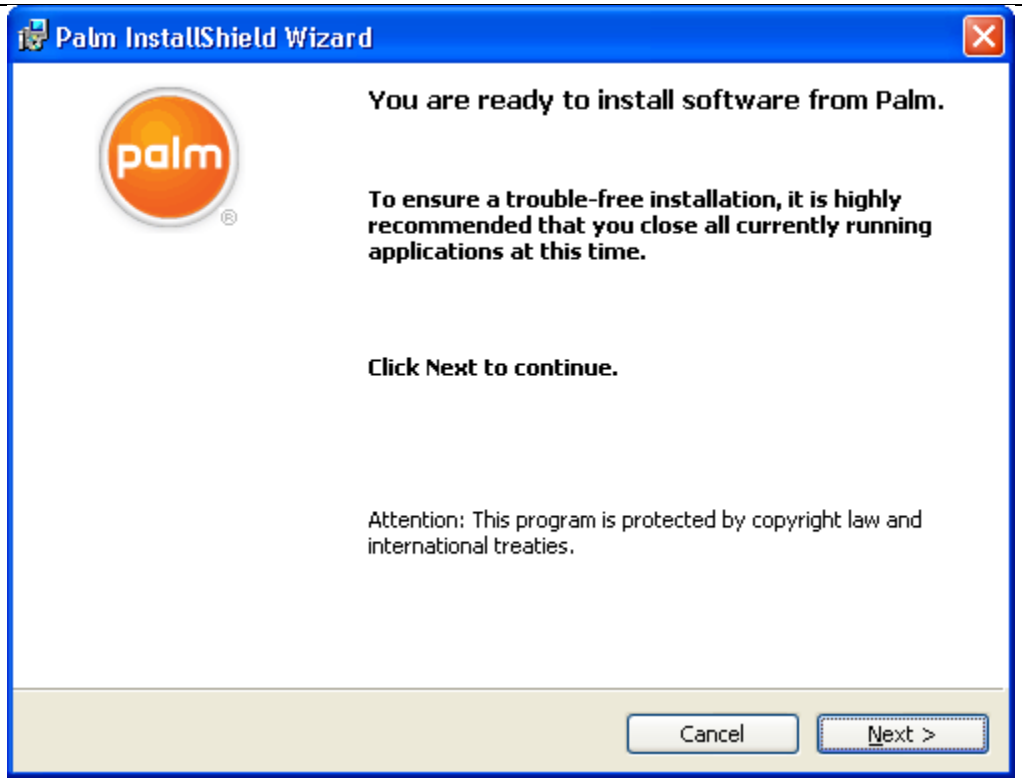
NOTE: If you are using the ***Vista*** Operating System, please visit http://www.idscanner.com/help/HotSyncIssues.htm**.**

When you insert the Orange CD, your PC will launch the installation screens below.


InstallShield Wizard
Palm Setup is preparing the InstallShield Wizard, which will guide you through the program setup process. Please wait.
Extracting: Palm.msi
Cancel



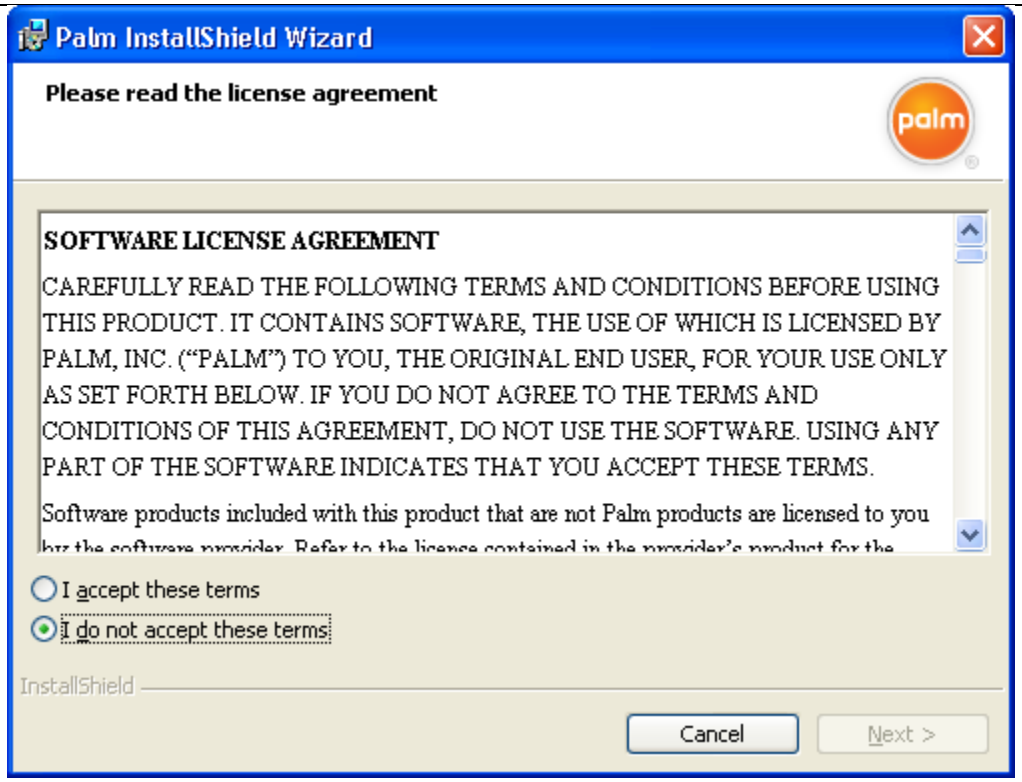

Palm InstallShield Wizard
Welcome to the InstallShield Wizard for Palm
Palm Setup is preparing the InstallShield Wizard which will guide you through the program setup process. Please wait.
Cancel
Next >


Palm InstallShield Wizard
You are ready to install software from Palm.
To ensure a trouble-free installation, it is highly recommended that you close all currently running applications at this time.
Click Next to continue.
Attention: This program is protected by copyright law and international treaties.
Cancel
Next >

___ As suggested in the dialog box above, close all currently running applications.

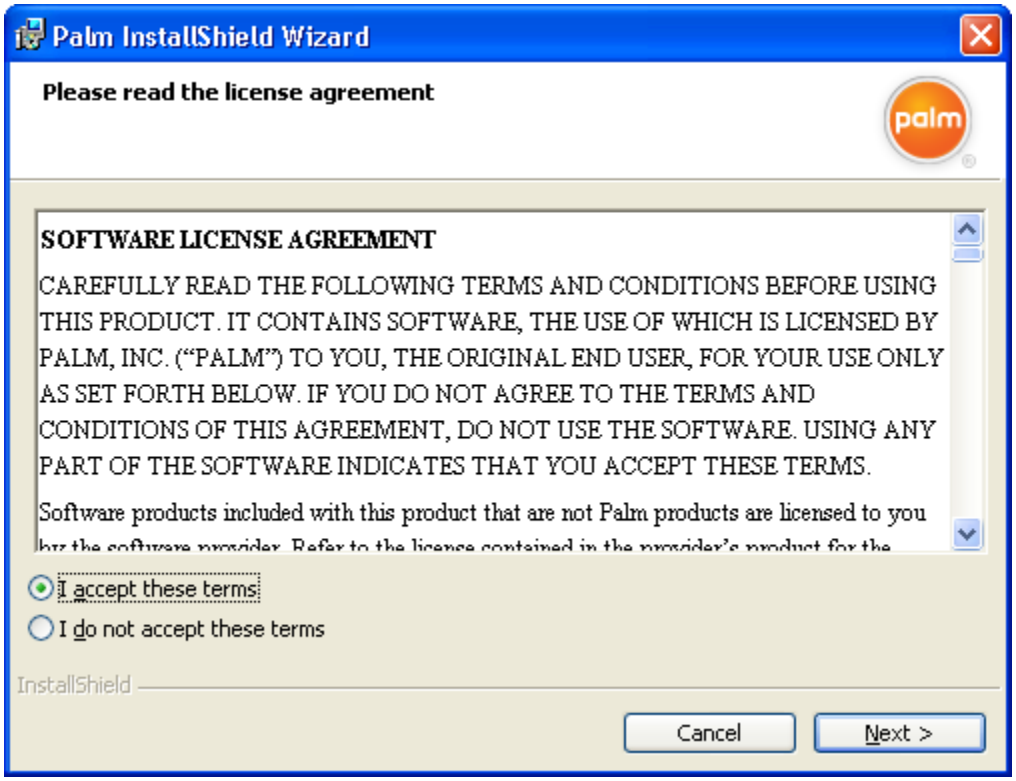
___ Click Next.

___ Read the license agreement below.

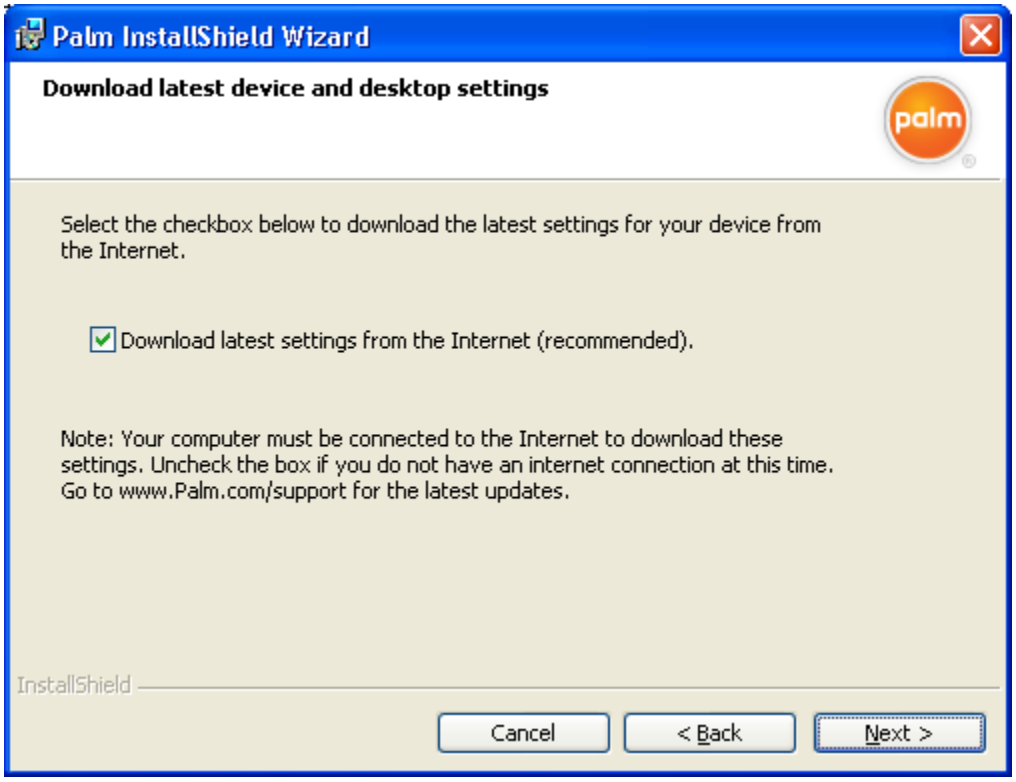

Palm InstallShield Wizard
Please read the license agreement
SOFTWARE LICENSE AGREEMENT
CAREFULLY READ THE FOLLOWING TERMS AND CONDITIONS BEFORE USING THIS PRODUCT. IT CONTAINS SOFTWARE, THE USE OF WHICH IS LICENSED BY PALM, INC. ("PALM") TO YOU, THE ORIGINAL END USER, FOR YOUR USE ONLY AS SET FORTH BELOW. IF YOU DO NOT AGREE TO THE TERMS AND CONDITIONS OF THIS AGREEMENT, DO NOT USE THE SOFTWARE. USING ANY PART OF THE SOFTWARE INDICATES THAT YOU ACCEPT THESE TERMS.
Software products included with this product that are not Palm products are licensed to you
I accept these terms
I do not accept these terms
InstallShield
Cancel
Next >

___ Click the radio button that says *I accept these terms.*

(Without your acceptance, the Palm software will not install.)


Palm InstallShield Wizard
Please read the license agreement
SOFTWARE LICENSE AGREEMENT
CAREFULLY READ THE FOLLOWING TERMS AND CONDITIONS BEFORE USING THIS PRODUCT. IT CONTAINS SOFTWARE, THE USE OF WHICH IS LICENSED BY PALM, INC. ("PALM") TO YOU, THE ORIGINAL END USER, FOR YOUR USE ONLY AS SET FORTH BELOW. IF YOU DO NOT AGREE TO THE TERMS AND CONDITIONS OF THIS AGREEMENT, DO NOT USE THE SOFTWARE. USING ANY PART OF THE SOFTWARE INDICATES THAT YOU ACCEPT THESE TERMS.
Software products included with this product that are not Palm products are licensed to you
I accept these terms
I do not accept these terms
InstallShield
Cancel
Next >

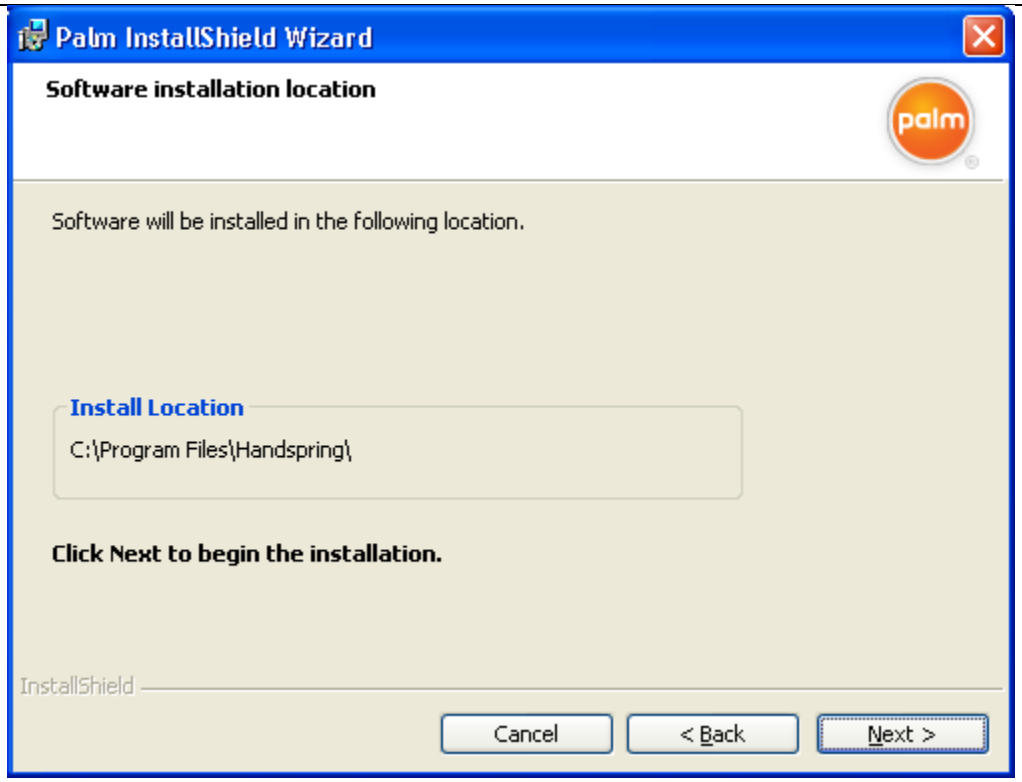
___ Click Next to continue installation.


Palm InstallShield Wizard
Download latest device and desktop settings
palm
Select the checkbox below to download the latest settings for your device from the Internet.
Download latest settings from the Internet (recommended).
Note: Your computer must be connected to the Internet to download these settings. Uncheck the box if you do not have an internet connection at this time. Go to www.Palm.com/support for the latest updates.
InstallShield
Cancel
< Back
Next >

___ Uncheck the *Download latest settings…* (unless you want to receive Palm's marketing materials).

___ Click Next

___ Notice the *Install Location* shown in the dialog box below.

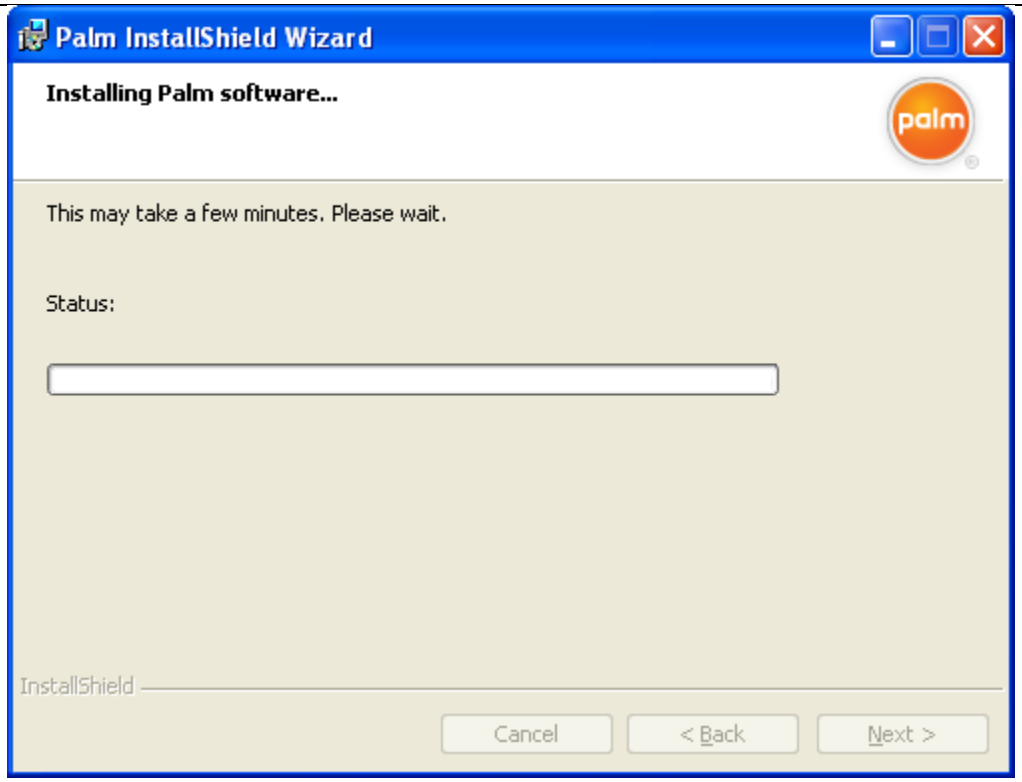


Note: If the install location displayed above is `C:\Program Files\Handspring`, then a previous version of the Palm Desktop is installed on your PC, AND if you click Next, this current installation software will over-write your previous version. If this is a new installation, the default location will be `C:\Program Files\Palm`.

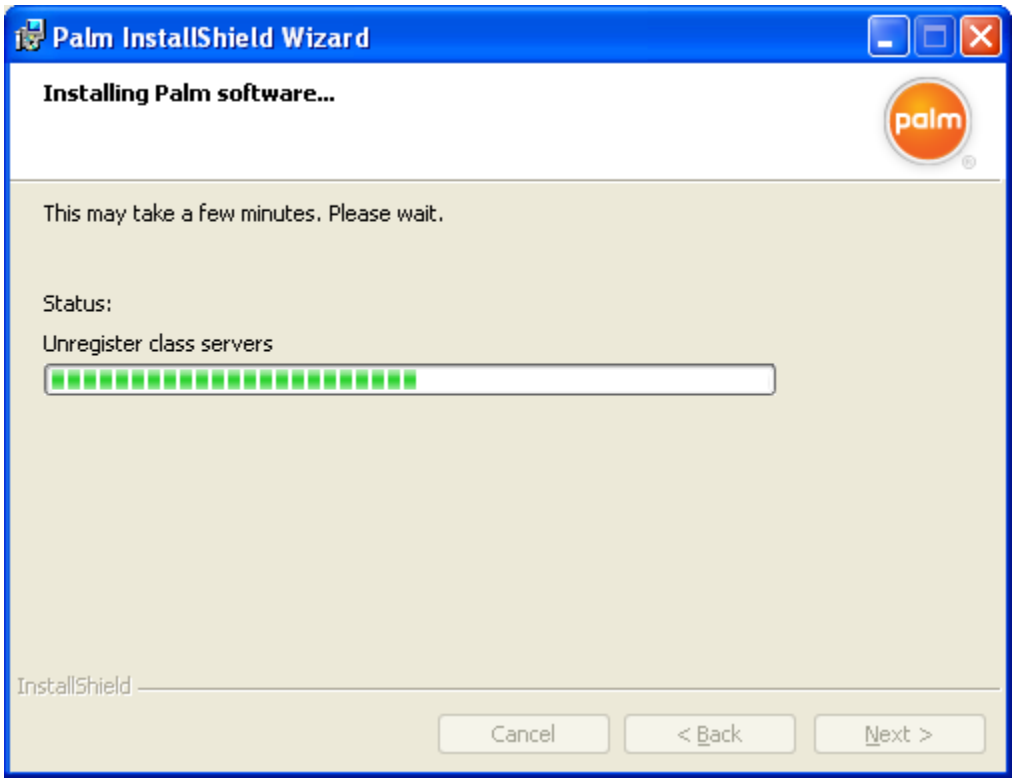
___ Click Next to accept the default Install Location shown above.

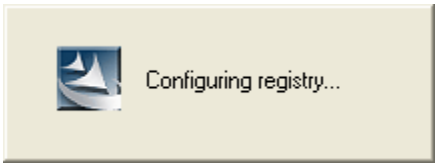
Note: First-time installs will default to `C:\Palm` directory, not `\Handspring`.

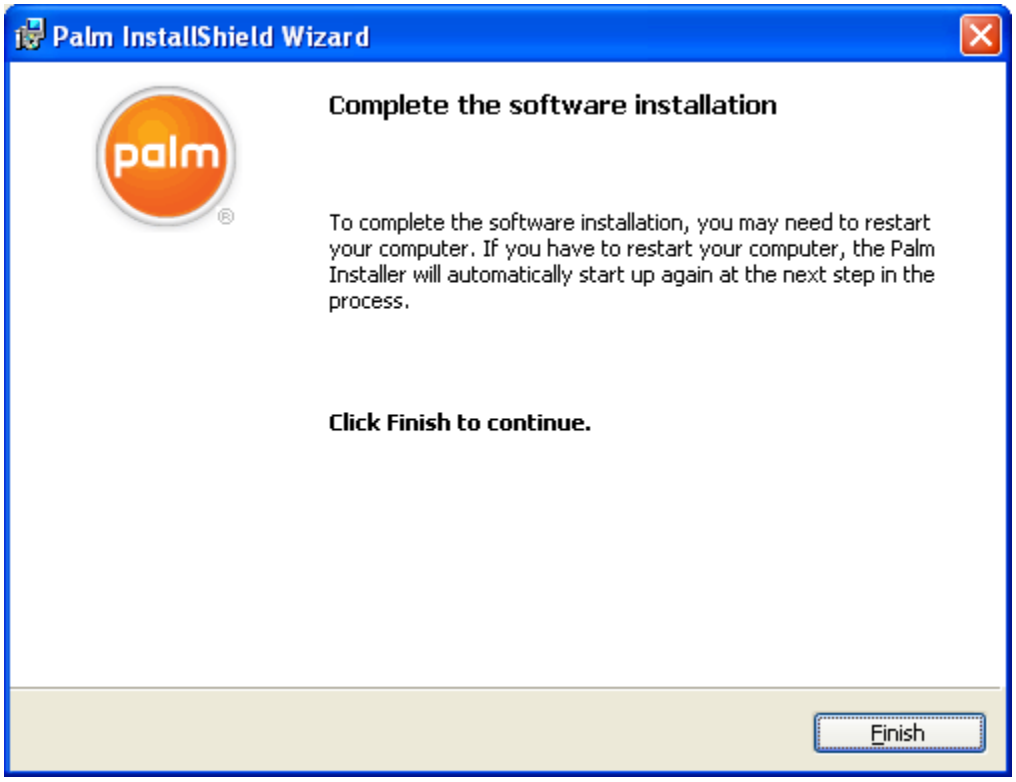
The install process will begin as shown below.



___ Notice that the green progress indicator moves to the right until the Palm software installation is complete.






Palm InstallShield Wizard
Complete the software installation
To complete the software installation, you may need to restart your computer. If you have to restart your computer, the Palm Installer will automatically start up again at the next step in the process.
Click Finish to continue.
Finish

___ Notice that the dialog box above says you may need to restart your computer.

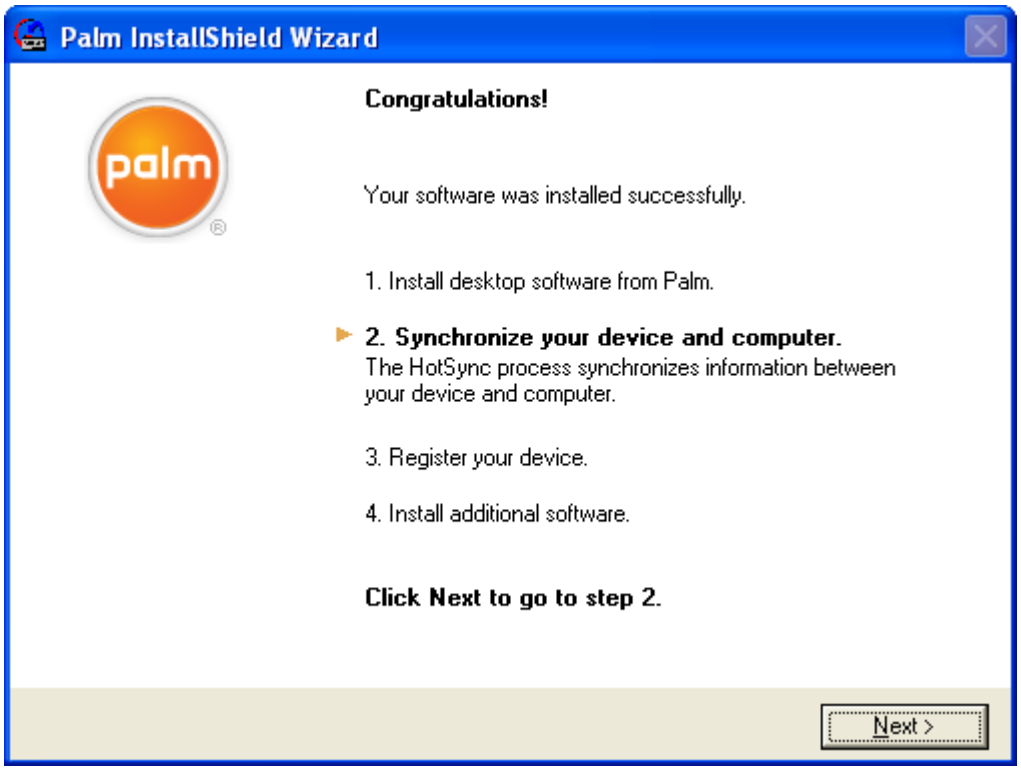
Typically, a restart is not required.

___ Click Finish to complete the software installation.

Synchronize your ID Scanner with your computer

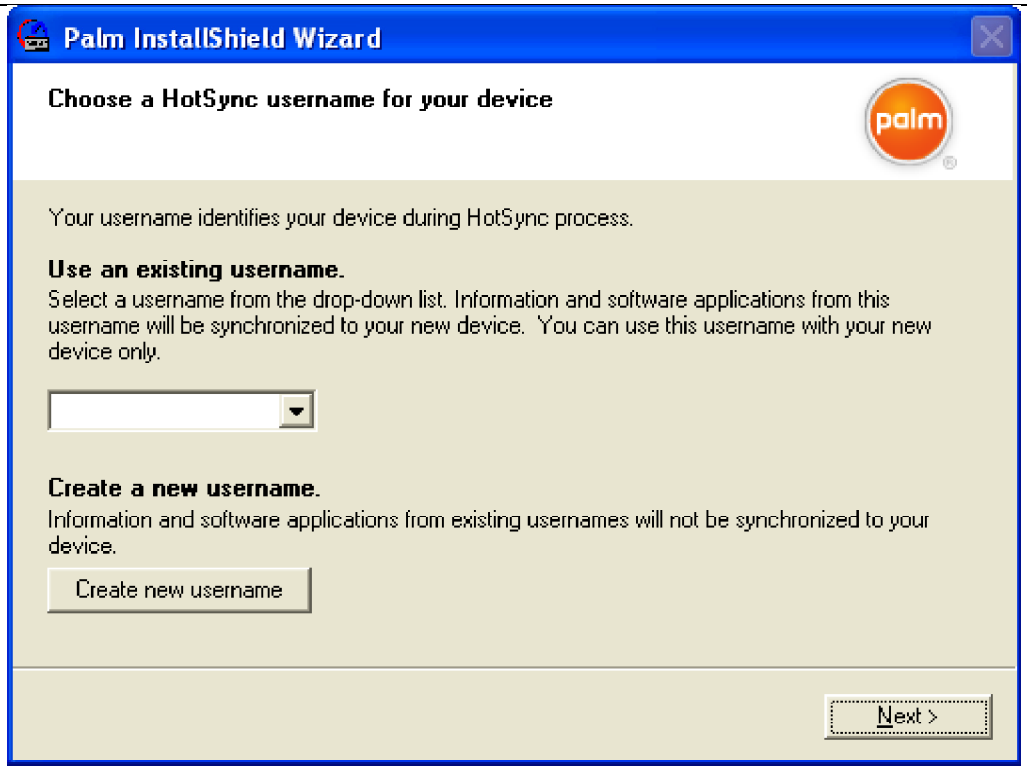
The next steps will show you how to sync (HotSync) your ID Scanner with your PC.

___ Restart your PC if necessary.


Palm InstallShield Wizard
Congratulations!
Your software was installed successfully.
1. Install desktop software from Palm.
2. Synchronize your device and computer.
The HotSync process synchronizes information between your device and computer.
3. Register your device.
4. Install additional software.
Click Next to go to step 2.
Next >

___ Click Next to synchronize your ID Scanner with your PC.

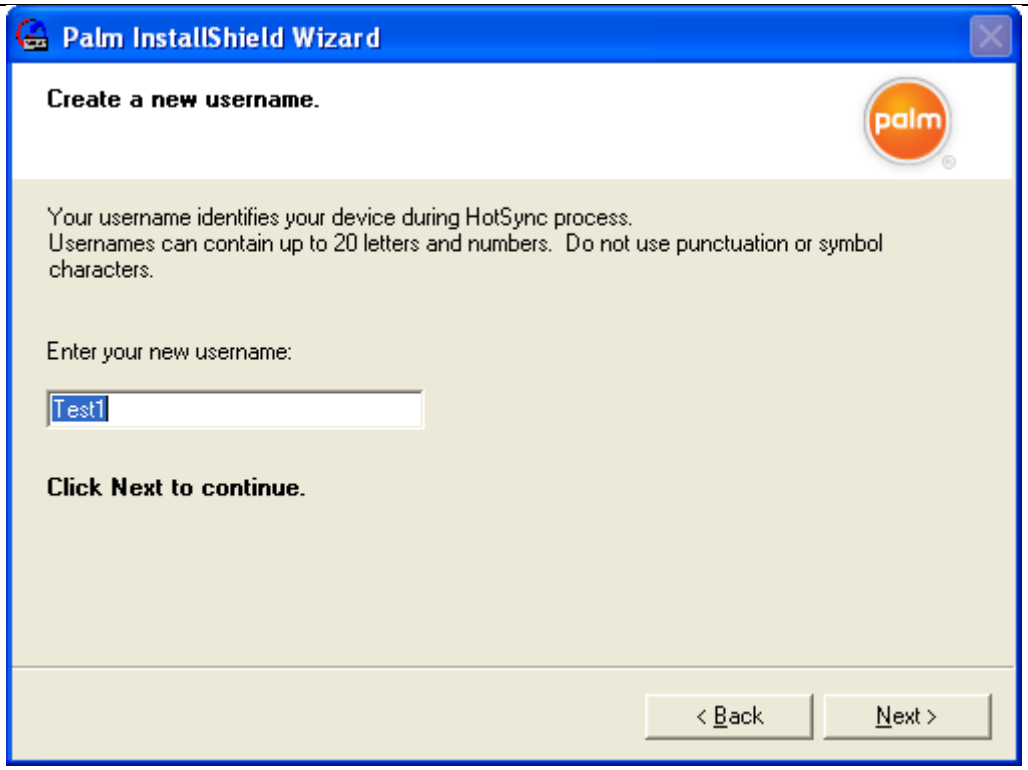
You will see the following dialog box.


Palm InstallShield Wizard
Choose a HotSync username for your device
palm
Your username identifies your device during HotSync process.
Use an existing username.
Select a username from the drop-down list. Information and software applications from this username will be synchronized to your new device. You can use this username with your new device only.
Create a new username.
Information and software applications from existing usernames will not be synchronized to your device.
Create new username
Next >

___ Click *Create new user name*.

Note: If this is a brand-new install, you will need to create a new name to get past this screen. However, whatever name you type won't be used because your IDVisor® ID scanner will already have a HotSync name of *IDVisor2*, *IDVisor3* or *IDVisor4* depending on which version of CardVisor software you have installed.

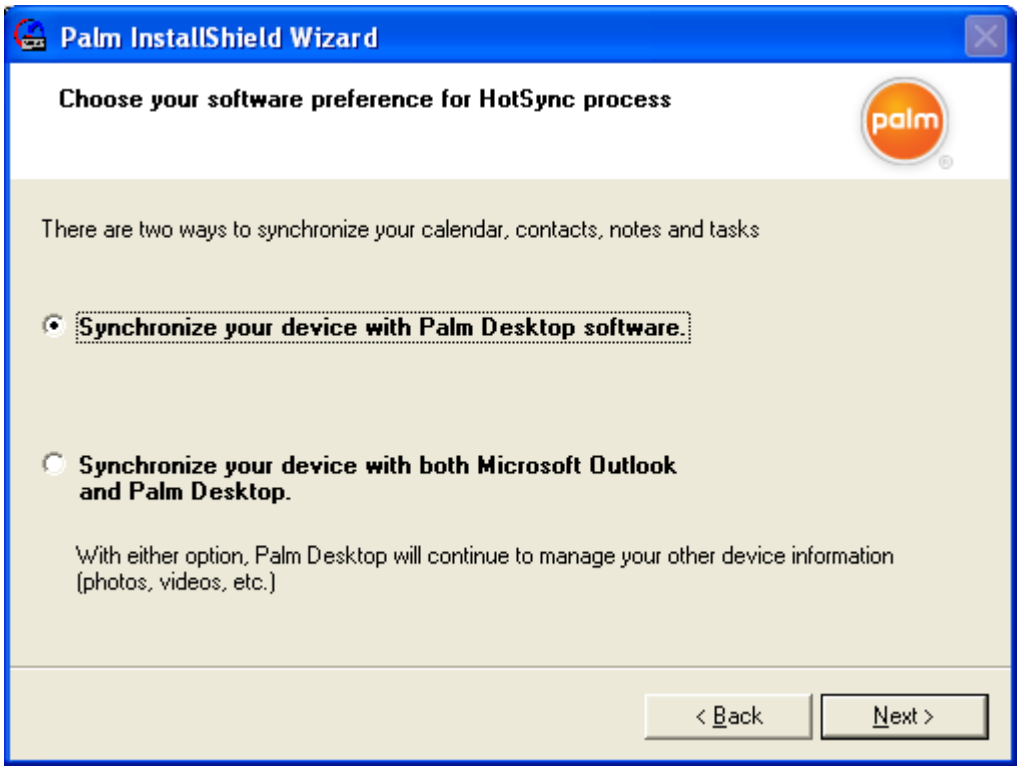
When you click *Create new user name,* you will see the following dialog box.


Palm InstallShield Wizard
Create a new username.
palm
Your username identifies your device during HotSync process.
Usernames can contain up to 20 letters and numbers. Do not use punctuation or symbol characters.
Enter your new username:
Test1
Click Next to continue.
< Back
Next >

___ Enter any new username.

___ Click Next.

If you have Microsoft Outlook installed on your PC, the following dialog box will display. This dialog box will help you specify your preference for the HotSync process.


Palm InstallShield Wizard
Choose your software preference for HotSync process
palm
There are two ways to synchronize your calendar, contacts, notes and tasks
Synchronize your device with Palm Desktop software.
Synchronize your device with both Microsoft Outlook and Palm Desktop.
With either option, Palm Desktop will continue to manage your other device information (photos, videos, etc.)
< Back
Next >

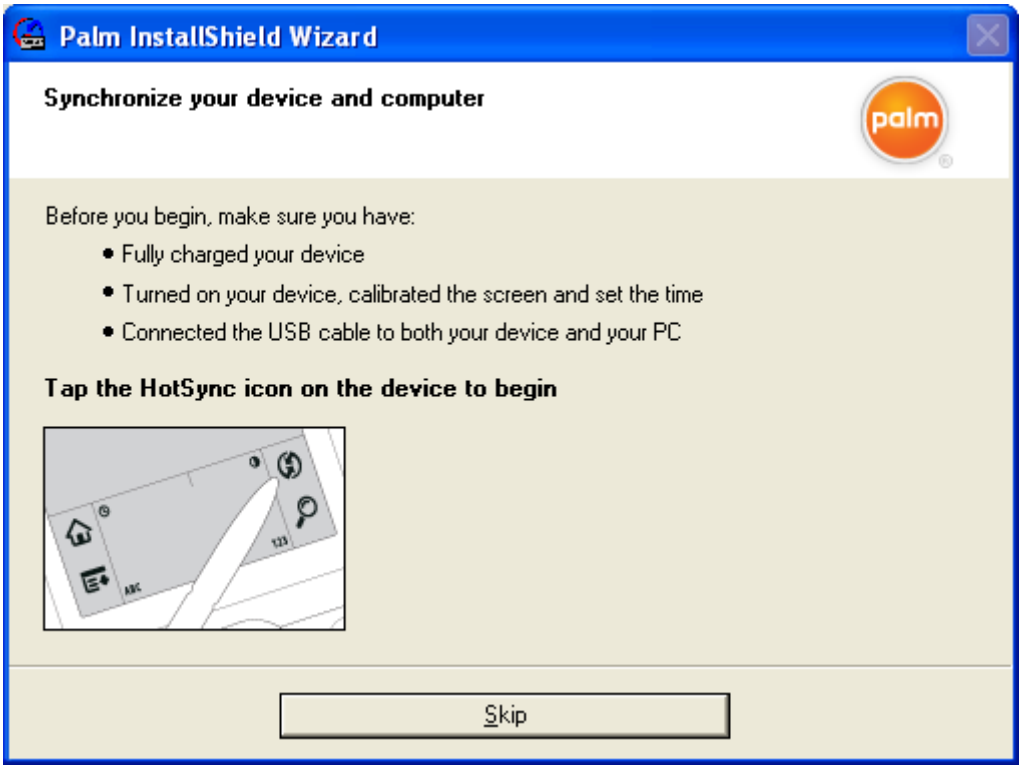
___ Do NOT click the bottom radio button *(Synchronize your device with both Outlook and Palm Desktop software)* at this point.

Here's why: If you select Outlook, your card-swipe data will be stored in Outlook where it is difficult to export to Excel. If you have accidentally used the Outlook option, see instructions at **How to Reinstall the CardVisor Software.**

___ Instead, click the *top* radio button *Synchronize your device with Palm Desktop software.*

___ Click Next.

You will then see the following dialog box to sync your ID Scanner and your PC.


Palm InstallShield Wizard
Synchronize your device and computer
palm
Before you begin, make sure you have:
• Fully charged your device
• Turned on your device, calibrated the screen and set the time
• Connected the USB cable to both your device and your PC
Tap the HotSync icon on the device to begin
Skip

___ Verify that you see the HotSync Icon in the bottom right corner of the PC screen (red/blue circular icon).

___ Connect the HotSync Cable between your ID Scanner's USB port and your computer.

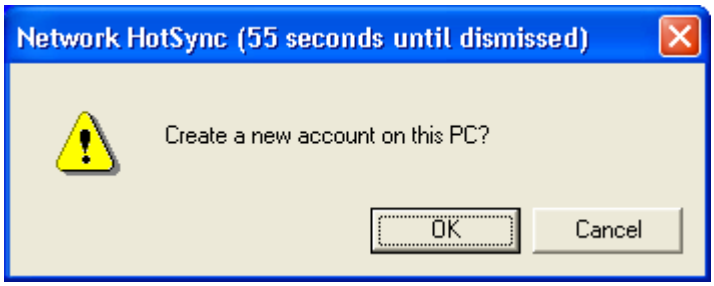
___ Look for a "new device found" message on your computer. You will likely hear a "thunk" sound if your speakers are on. (If your computer doesn't recognize the device, try disconnecting and reconnecting the USB cable.)

___ Tap the HotSync Button on your ID Scanner (see the illustration in the dialog box above).

___ Check the bottom right-hand corner of your computer screen for possible messages about finding a new device and installing the driver.

NOTE: There may be a delay because your computer is installing a HotSync driver. Often, installing a driver causes the HotSync process to time-out. Your computer might say something like, *"couldn't connect to the scanner."* Don't be alarmed; just tap the HotSync Button again.

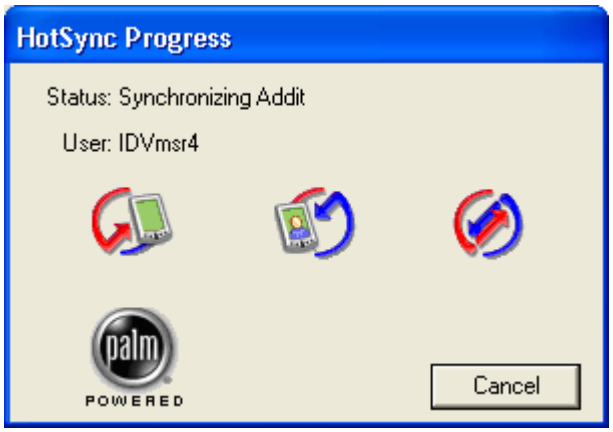
This will bring up the following dialog boxes.



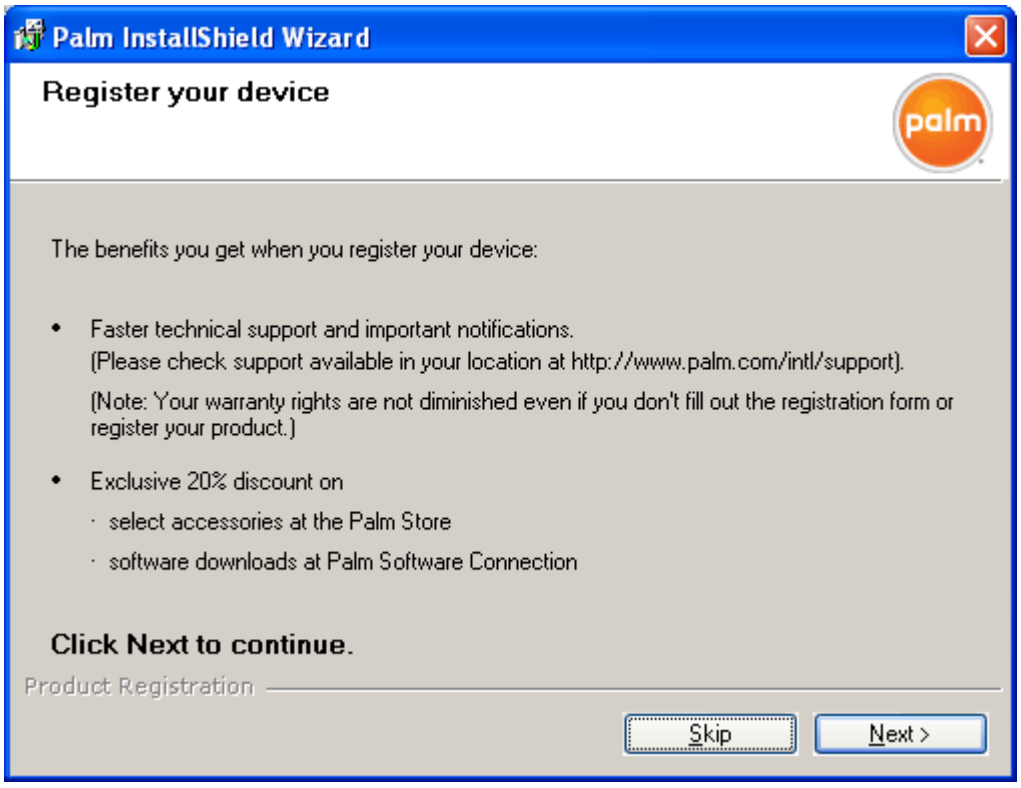
___ Click OK to continue.

___ Notice that your ID Scanner's User name will display in the dialog box.

(Example dialog box shows User name as *IDmsr4*. Your User name will likely be different.)



When the HotSync is complete, you will see the following registration dialog box.

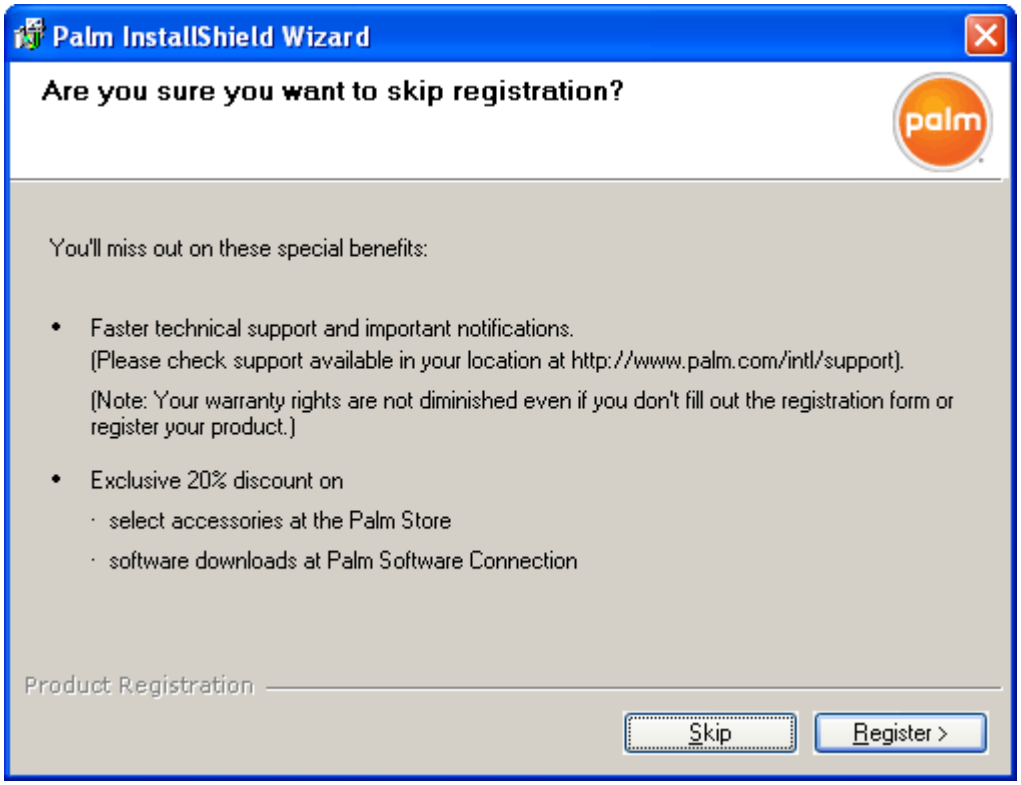

Palm InstallShield Wizard
Register your device
palm
The benefits you get when you register your device:
• Faster technical support and important notifications.
(Please check support available in your location at http://www.palm.com/intl/support).
(Note: Your warranty rights are not diminished even if you don't fill out the registration form or register your product.)
• Exclusive 20% discount on
· select accessories at the Palm Store
· software downloads at Palm Software Connection
Click Next to continue.
Product Registration
Skip
Next >

Register your ID Scanner device (Skip this section).

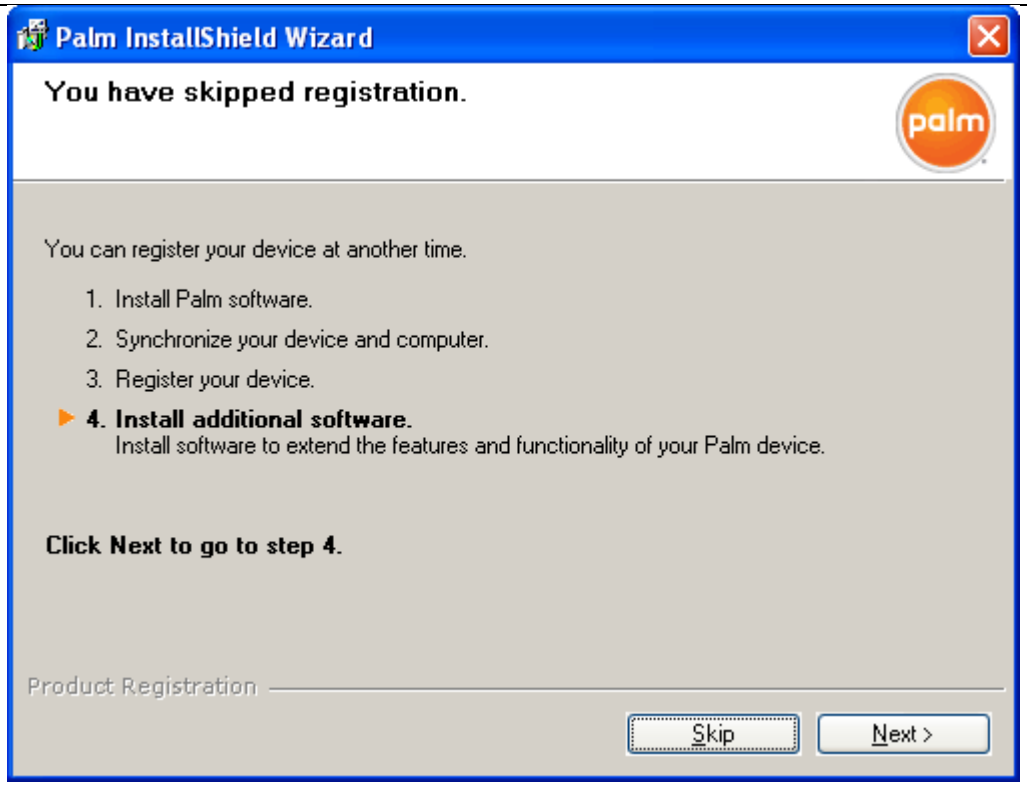
Following are the instructions for optionally registering your ID Scanner with Palm if you want Palm to send you marketing material so please skip this section.

___ Register with Palm (optional).

If you click Skip, you will see the next dialog box to get a 2nd chance.


Palm InstallShield Wizard
Are you sure you want to skip registration?
palm
You'll miss out on these special benefits:
• Faster technical support and important notifications.
(Please check support available in your location at http://www.palm.com/intl/support).
(Note: Your warranty rights are not diminished even if you don't fill out the registration form or register your product.)
• Exclusive 20% discount on
· select accessories at the Palm Store
· software downloads at Palm Software Connection
Product Registration
Skip
Register >

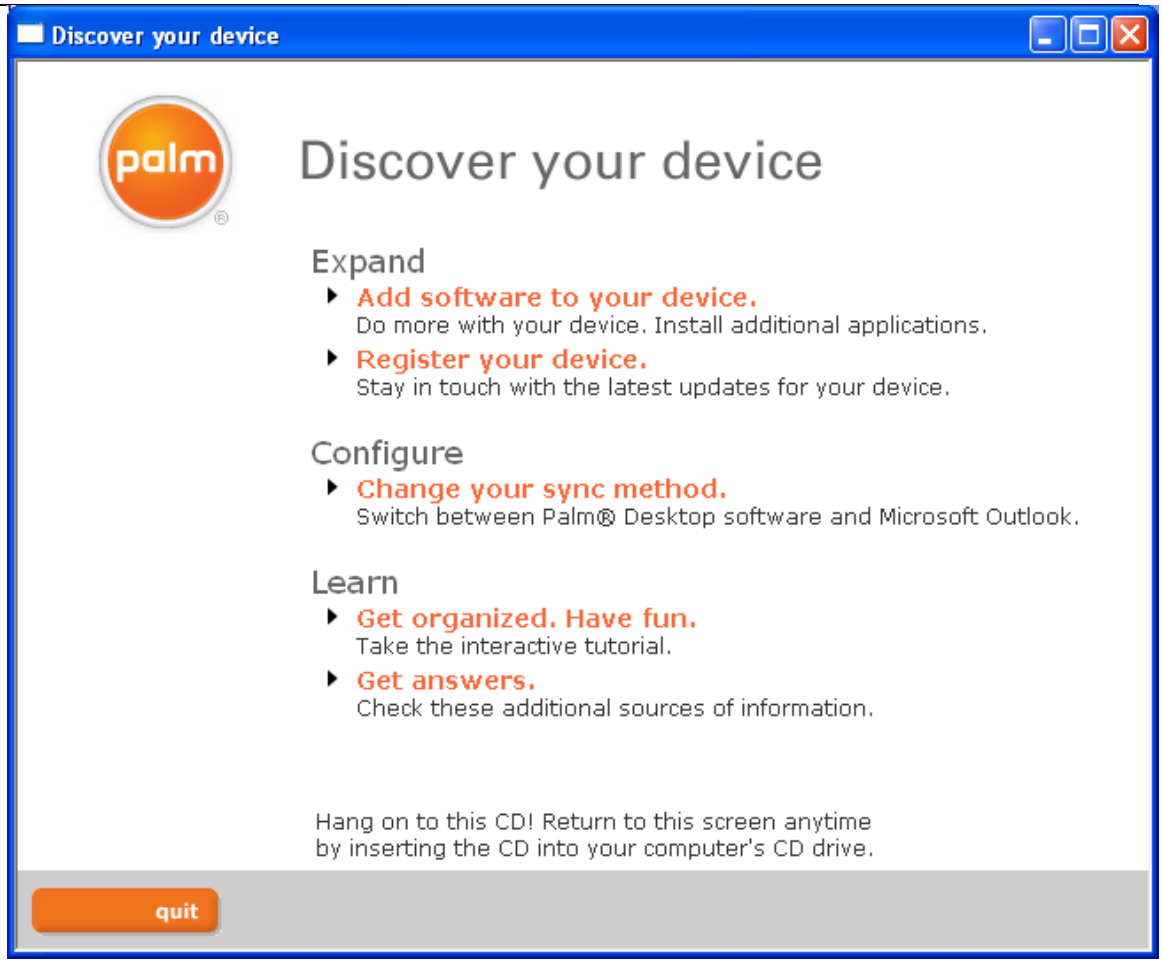
If you click Skip again, you will see the following dialog box.


Palm InstallShield Wizard
You have skipped registration.
palm
You can register your device at another time.
1. Install Palm software.
2. Synchronize your device and computer.
3. Register your device.
4. Install additional software.
Install software to extend the features and functionality of your Palm device.
Click Next to go to step 4.
Product Registration
Skip
Next >

___ Click Next

Install additional Software (skip this section)

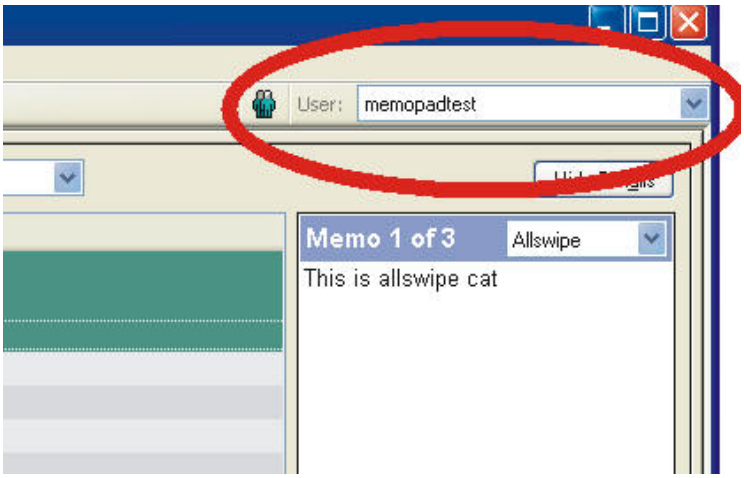
After you have synchronized your ID Scanner, Palm gives you an opportunity to install additional software on your ID Scanner.


Discover your device
palm
Discover your device
Expand
Add software to your device.
Do more with your device. Install additional applications.
Register your device.
Stay in touch with the latest updates for your device.
Configure
Change your sync method.
Switch between Palm® Desktop software and Microsoft Outlook.
Learn
Get organized. Have fun.
Take the interactive tutorial.
Get answers.
Check these additional sources of information.
Hang on to this CD! Return to this screen anytime
by inserting the CD into your computer's CD drive.
quit

___ Click Quit

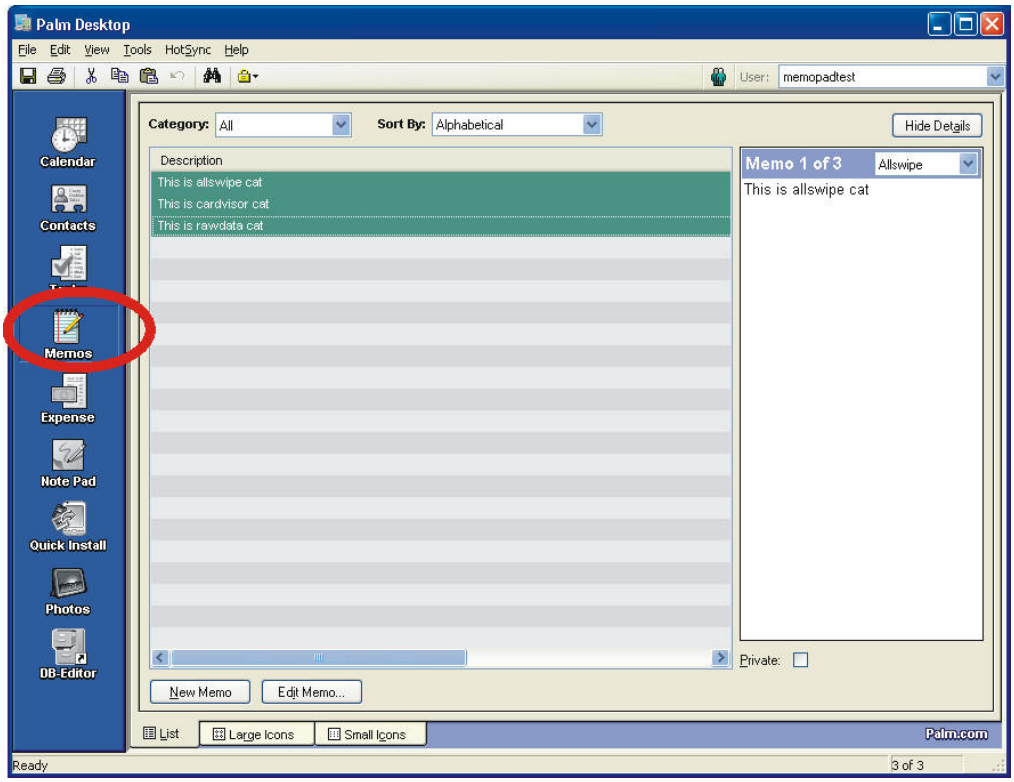
___ Once Hotsync is complete, launch the Palm Desktop application.

___ Set the User name to the one just created (see user name pull down menu in top right corner)



___ Click the MemoPad icon on the left menu bar.

Shown below is what the Main screen of the Palm Desktop with the Memo Pad active should look like.



___ Check that the number of Memos matches the number of Memos in the ID Scanner. On the left, the Memo is highlighted and on the right are its contents.

___ Verify that you can see the SAME Memos on your ID Scanner by pressing the button labeled View Data on the ID Scanner.

___ If no memos are visible on the Palm Desktop, see the troubleshooting section at **HotSync Troubleshooting**.

Troubleshooting tip: If there are no Memos visible and the HotSync operation worked OK, verify that Outlook is NOT the default program for syncing data. If Outlook is the default program for syncing data, go to **HotSync Troubleshooting**.

Exporting from Palm Desktop & Importing to Microsoft Excel

The ID Scanner's CardVisor software saves its transactions as Memos in its MemoPad application. When you HotSync to your Palm Desktop, these Memos are copied directly to your PC or Mac computer's MemoPad.

There are two methods to move the Memo data from the Palm Desktop to Microsoft Excel.

1. **For PC users who use MemoPad:** In 2007, MemoPad2CSV software for PC computers was introduced to help automate the export process. For instructions, see **Method 1. Exporting data from a PC Palm Desktop – Using MemoPad2CSV** below.
2. **For Mac users:** You will need to export the Memo data from the Palm Desktop to a file, then open the file using Microsoft Excel's Import Wizard. For instructions, see **Method 2. Exporting data from a Mac or PC Palm Desktop – Original Method.**

Method 1. Exporting data from a PC Palm Desktop – Using MemoPad2CSV

Introduction

The ID Scanner's CardVisor software saves its transactions as Memos in its MemoPad application. When you HotSync to your Palm Desktop, these Memos are copied directly to your PC's MemoPad. *Reminder:* Vista users must **Method 2. Exporting data from a Mac or PC Palm Desktop – Original Method** below.

The MemoPad2CSV utility extracts Memo data from your PC's MemoPad and creates a *csv (Comma Separated Value) file, which Microsoft Excel can open.

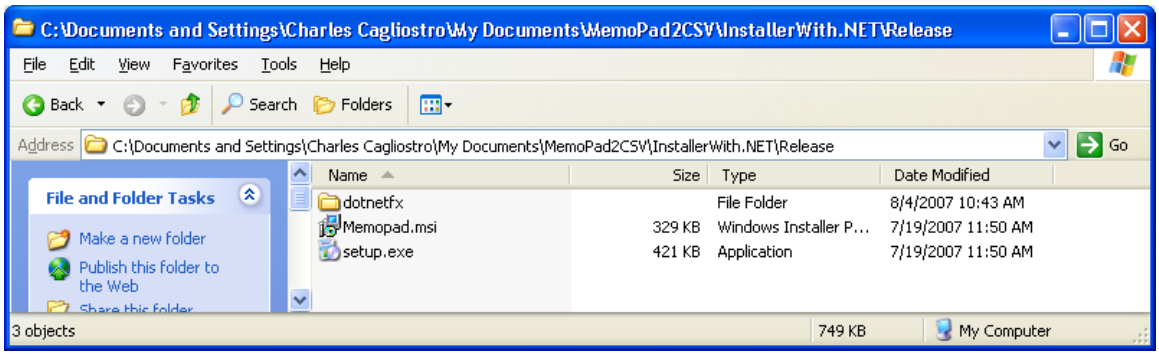
(Without this MemoPad2CSV utility, you must manually extract and export Memo data to a text file, then import the text file into Microsoft Excel using Excel's Import Wizard. MemoPad2CSV automates the process for PC users.)

Note: MemoPad2CSV requires Microsoft .NET framework 2.0, which is automatically installed when MemoPad2CSV is installed.

Software Installation

___ Find the directory on the white CardVisor CD where the MemoPad2CSV setup application is located. It will be in the MemoPad2CSV directory.

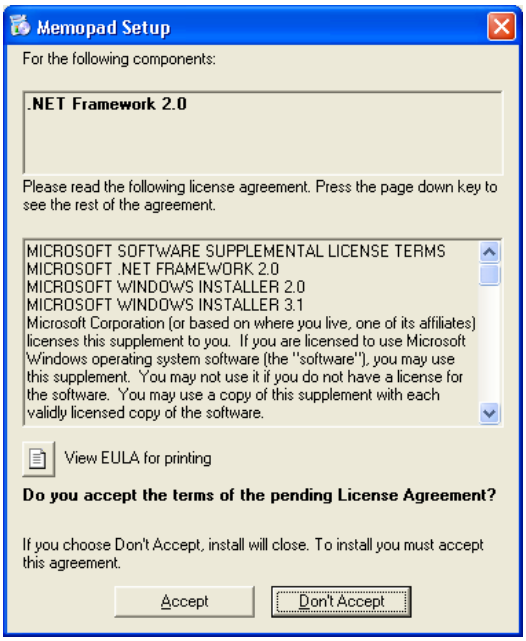
Shown below is an example of this directory


C:\Documents and Settings\Charles Cagliostro\My Documents\MemoPad2CSV\InstallerWith.NET\Release
File Edit View Favorites Tools Help
Back Search Folders
Address C:\Documents and Settings\Charles Cagliostro\My Documents\MemoPad2CSV\InstallerWith.NET\Release
Go
File and Folder Tasks
Make a new folder
Publish this folder to the Web
Name Size Type Date Modified
dotnetfx File Folder 8/4/2007 10:43 AM
Memopad.msi 329 KB Windows Installer P... 7/19/2007 11:50 AM
setup.exe 421 KB Application 7/19/2007 11:50 AM
3 objects 749 KB My Computer

___ Double click on the setup.exe file.

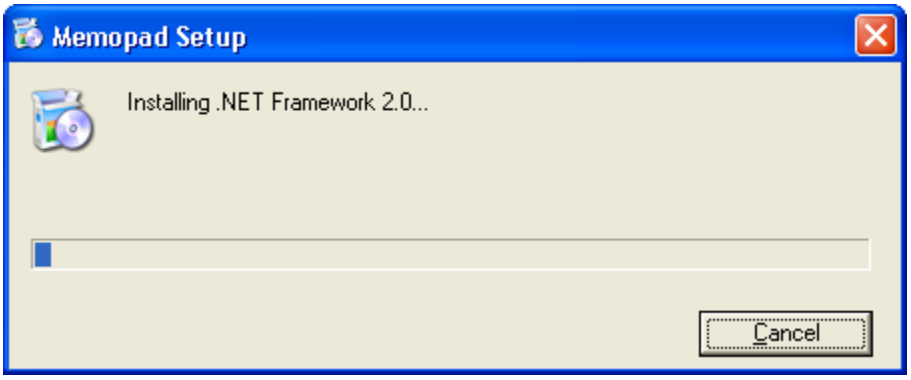
___ If .NET framework is already installed on your PC then the screen shown in the **Installing Main MemoPad2CSV** section will be displayed. If so, skip to that section. If not, the screen shown below will be displayed. Continue below and follow prompts to install .NET framework.

Note: The .NET Framework 2.0 is in the dotnetfx directory on the CD shown above.


Memopad Setup
For the following components:
.NET Framework 2.0
Please read the following license agreement. Press the page down key to see the rest of the agreement.
MICROSOFT SOFTWARE SUPPLEMENTAL LICENSE TERMS
MICROSOFT .NET FRAMEWORK 2.0
MICROSOFT WINDOWS INSTALLER 2.0
MICROSOFT WINDOWS INSTALLER 3.1
Microsoft Corporation (or based on where you live, one of its affiliates) licenses this supplement to you. If you are licensed to use Microsoft Windows operating system software (the "software"), you may use this supplement. You may not use it if you do not have a license for the software. You may use a copy of this supplement with each validly licensed copy of the software.
View EULA for printing
Do you accept the terms of the pending License Agreement?
If you choose Don't Accept, install will close. To install you must accept this agreement.
Accept
Don't Accept

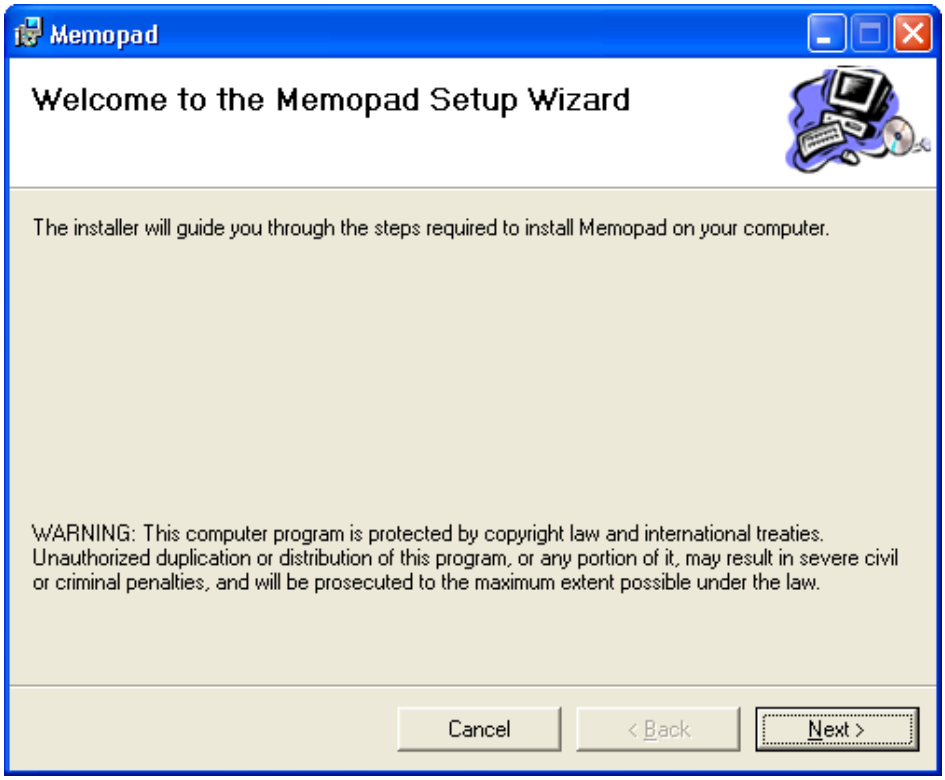
___ Press Accept to Continue

The following dialog box will display. Note installation can take a few minutes

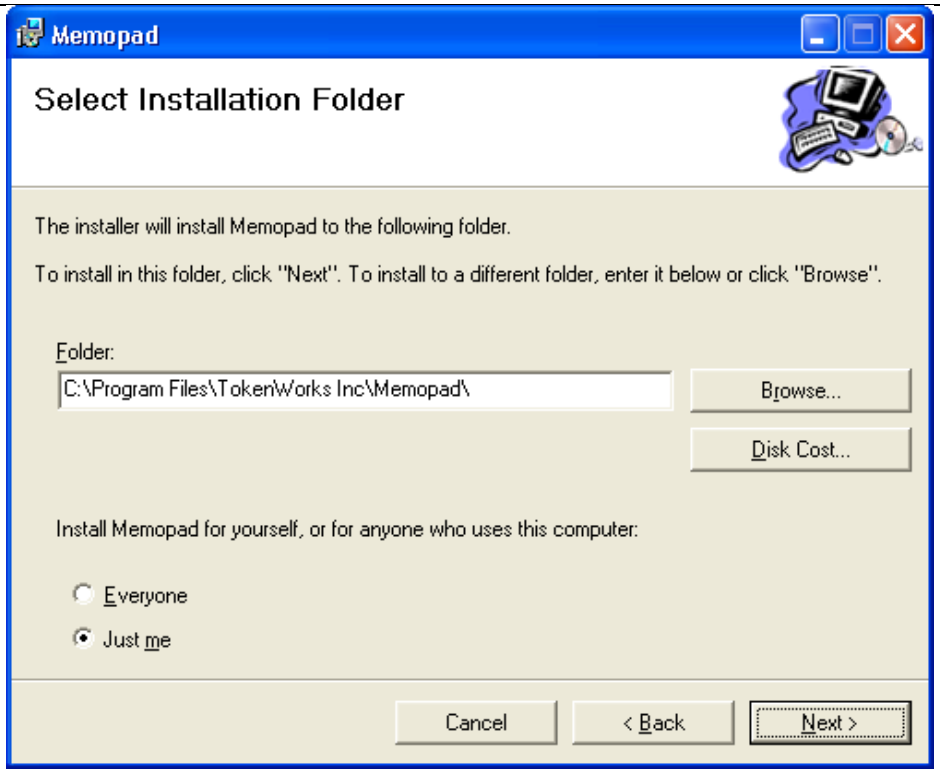


Installing Main MemoPad2CSV Program

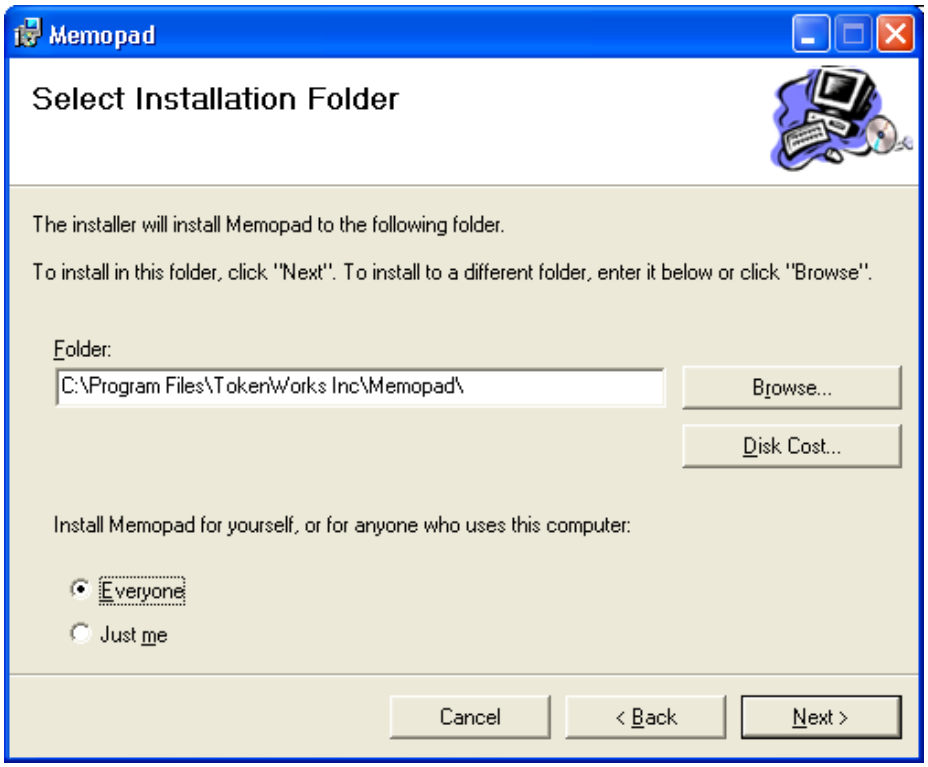
Once .Net is installed, the MemoPad Setup Wizard welcome screen will display.


Memopad
Welcome to the Memopad Setup Wizard
The installer will guide you through the steps required to install Memopad on your computer.
WARNING: This computer program is protected by copyright law and international treaties. Unauthorized duplication or distribution of this program, or any portion of it, may result in severe civil or criminal penalties, and will be prosecuted to the maximum extent possible under the law.
Cancel
< Back
Next >

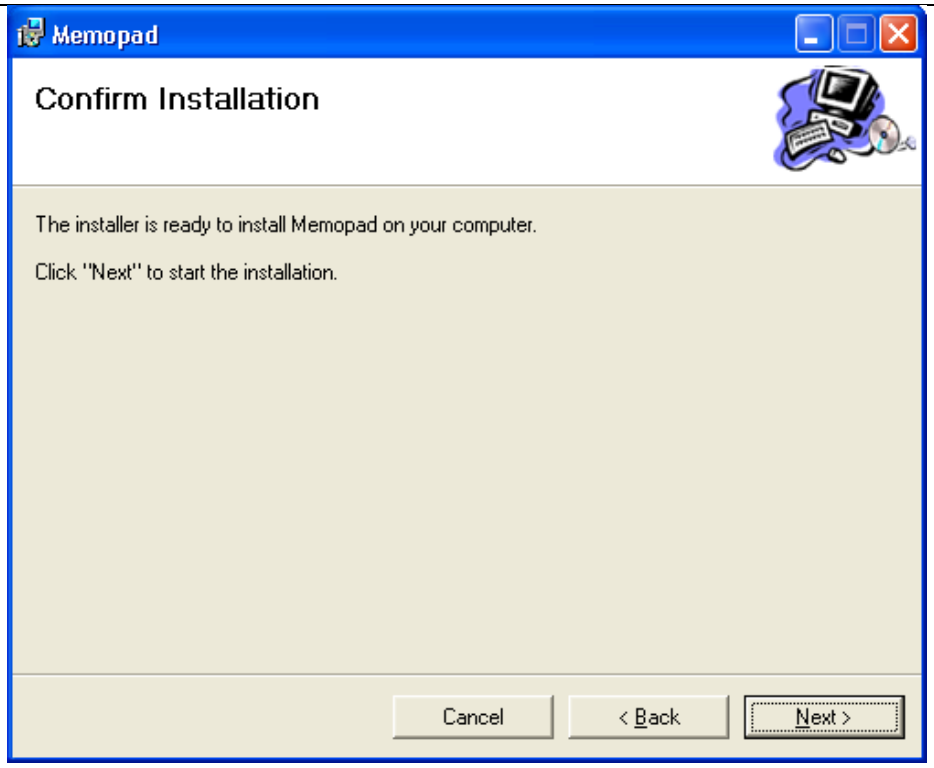
___ Click Next


Memopad
Select Installation Folder
The installer will install Memopad to the following folder.
To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse".
Folder:
C:\Program Files\TokenWorks Inc\Memopad\
Browse...
Disk Cost...
Install Memopad for yourself, or for anyone who uses this computer:
Everyone
Just me
Cancel
< Back
Next >

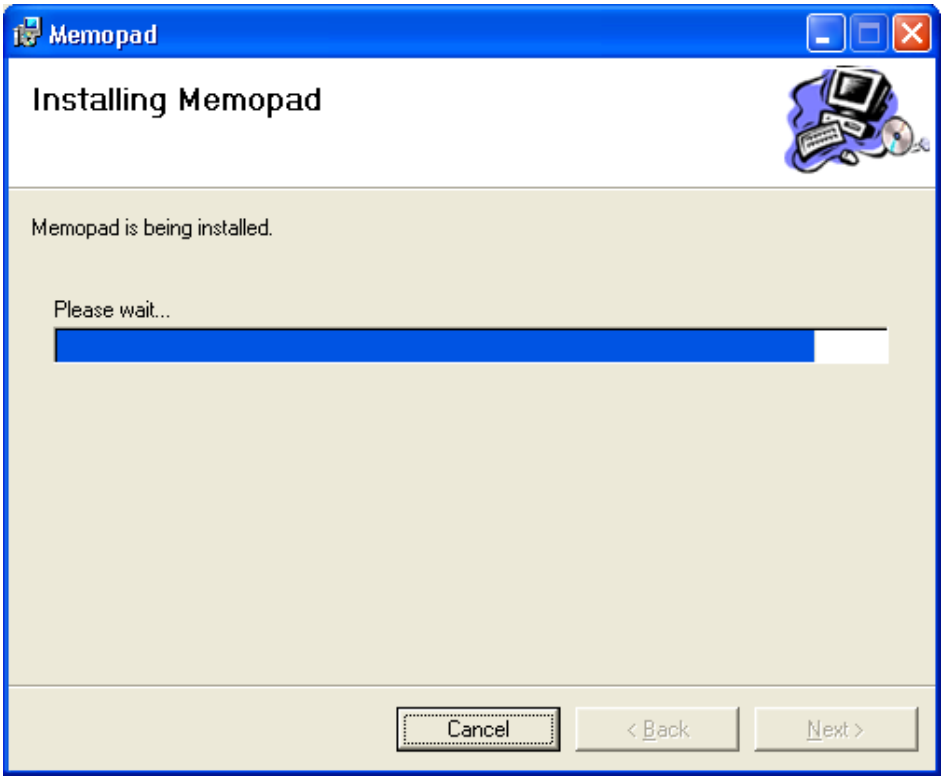
___ Accept the default folder and select 'Everyone', then hit Next


Memopad
Select Installation Folder
The installer will install Memopad to the following folder.
To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse".
Folder:
C:\Program Files\TokenWorks Inc\Memopad\
Browse...
Disk Cost...
Install Memopad for yourself, or for anyone who uses this computer:
Everyone
Just me
Cancel
< Back
Next >

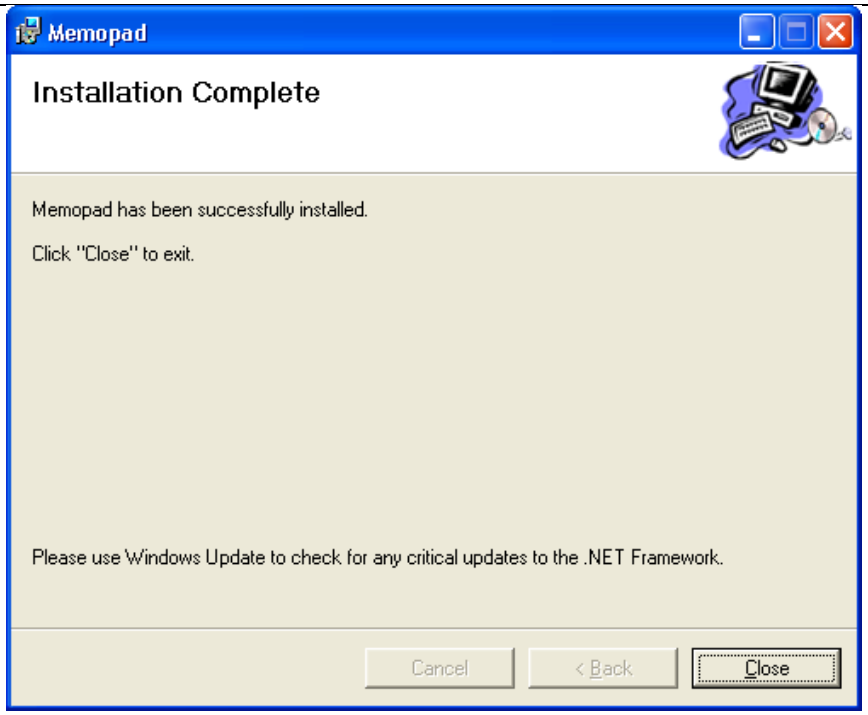
___ Click Next


Memopad
Confirm Installation
The installer is ready to install Memopad on your computer.
Click "Next" to start the installation.
Cancel
< Back
Next >

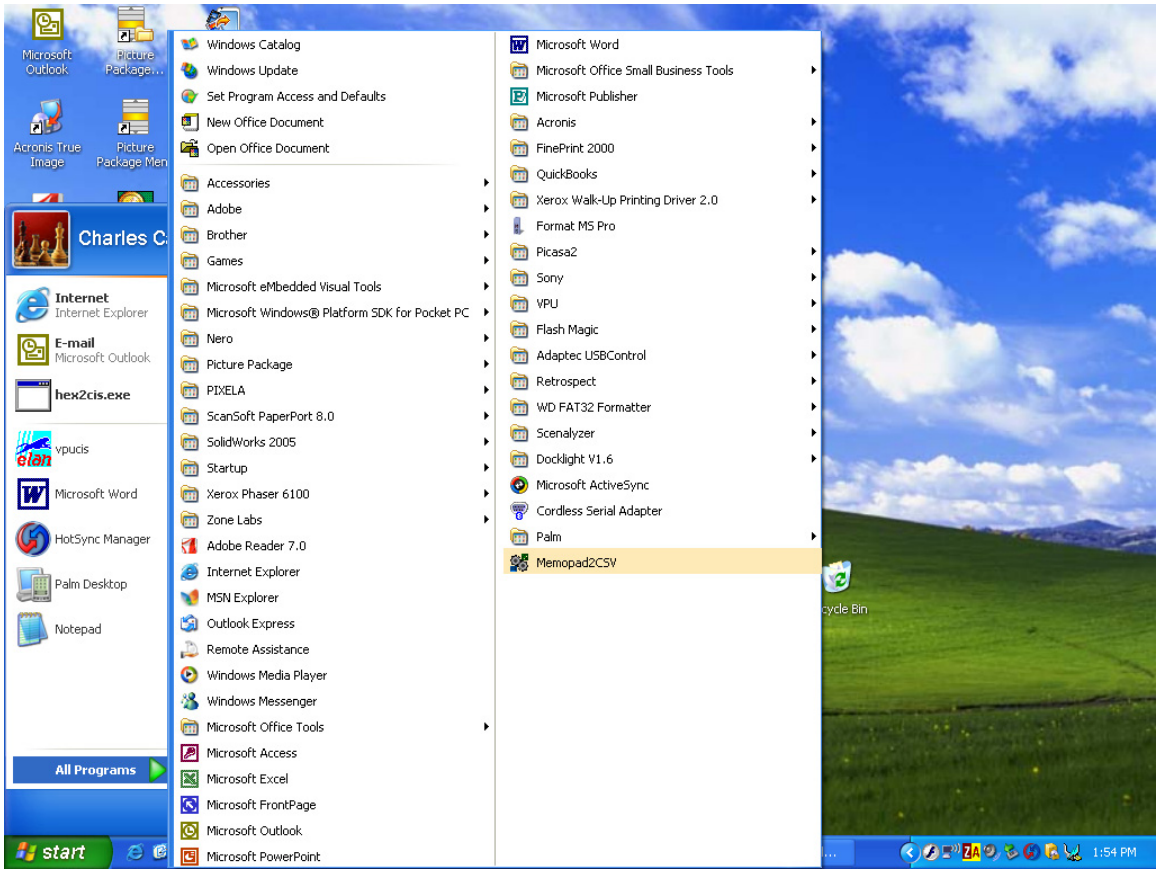
___ Click Next



___ Wait



___ Click Close

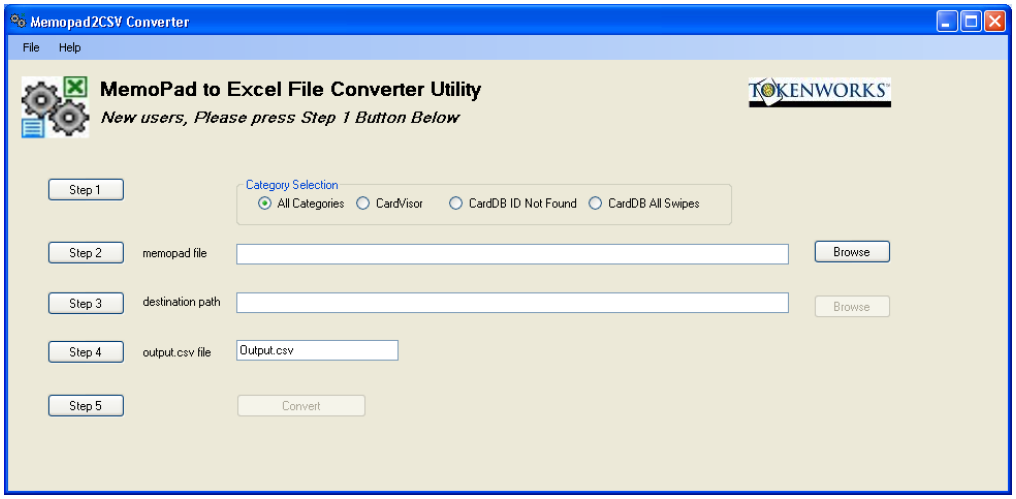


Memopad2CSV program icon should be on desktop and in programs menu.

___ Click icon to launch Memopad2CSV.

Running Memopad2CSV Conversion Utility

___ Click on the Memopad2CSV icon, the following dialog box will display



___ Notice the Simple Step 1, Step 2,…Step 5 buttons. Just click on each button in order and the software will guide you through the process.

The information below is provided for your convenience and we STRONLY suggest you use these step 1, Step 2, … Step 5 buttons for directions.

Below is an example if your using Palm Desktop version 4.14.

___ Notice the Category Selection radio buttons at the top of the above dialog box:

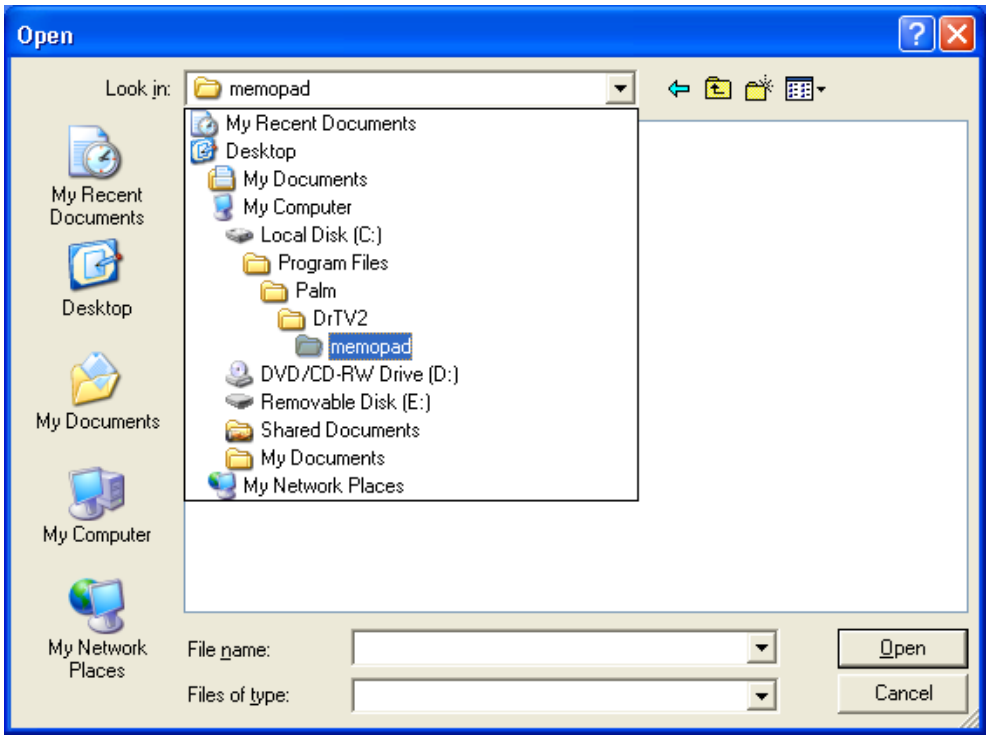
___ If you're using the ID Scanner to read *drivers licenses*, click the CardVisor Category radio button.

___ If you're using the ID Scanner to read *student IDs*, click the CardDB Category radio button. Refer to the respective software manuals.

___ Click the top Browse button to locate the memopad.dat file, located in the MemoPad directory under the HotSync User name directory, which is named whatever the HotSync User name is for that ID scanner.

___ Next, to find the memopad file. Click on the Step 2 button to get detailed directions on how to find this file as it varies depending on what version of the Palm Desktop. For example, in Palm Desktop version 4.14, you click the top

Browse button and navigate to Program Files\Palm\[*your HotSync User Name*]. In the example below, the *Hotsync User Name* is **memopad** - see dialog box below.

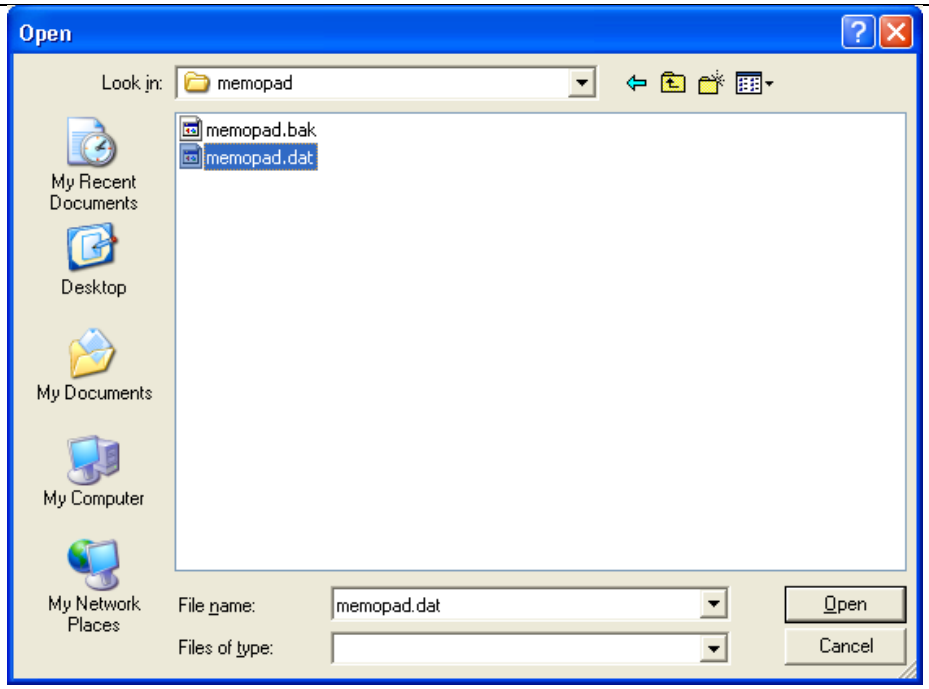


You may have multiple HotSync user names in your Palm directory, so choose the user name that corresponds to the ID Scanner that has the data you want.

___ Select the MemoPad directory as shown above.

___ Click Open.

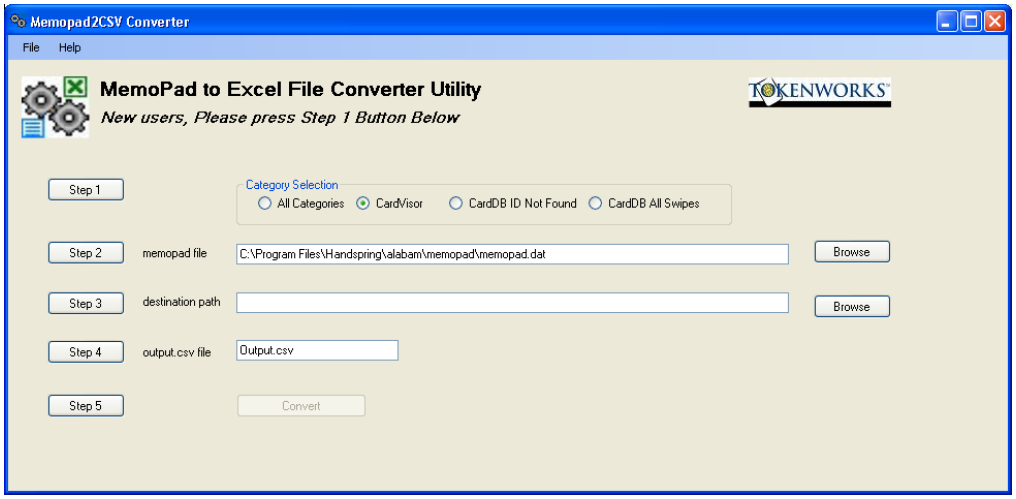
This example dialog box below shows the MemoPad directory below for the DrTV2 HotSync User name.



___ Select memopad.dat as shown above.

___ Click Open.

The main screen of memopad2CSV will update the path as shown below.

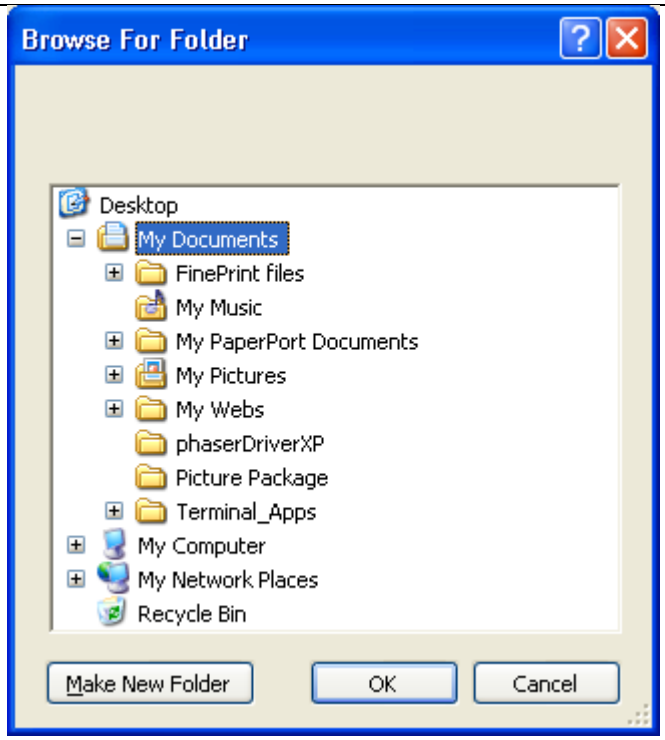


___ Click the 2nd Browse button for the destination path.

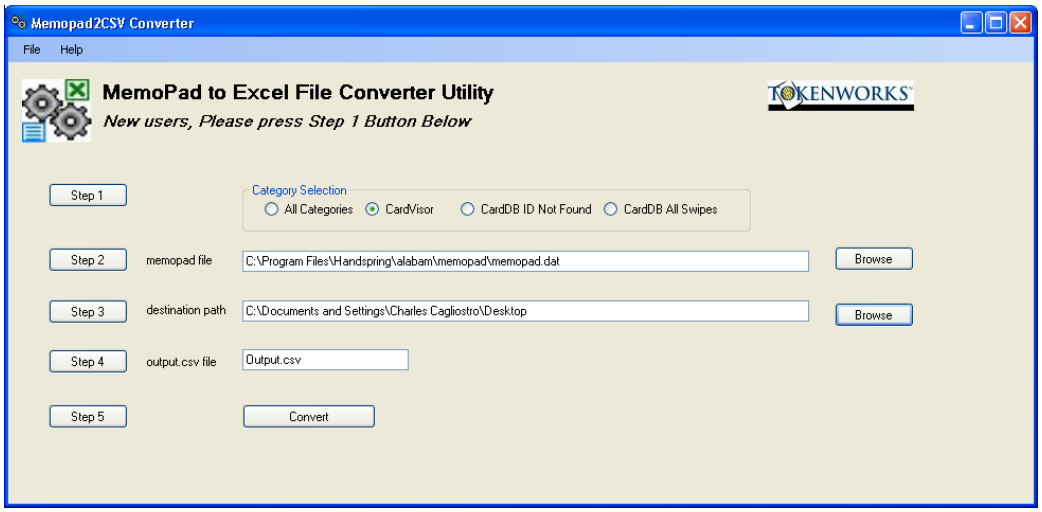
The destination path tells the computer where to store the output file.

___ Select a destination such as My Documents.

Here's an example showing My Documents as the destination folder.

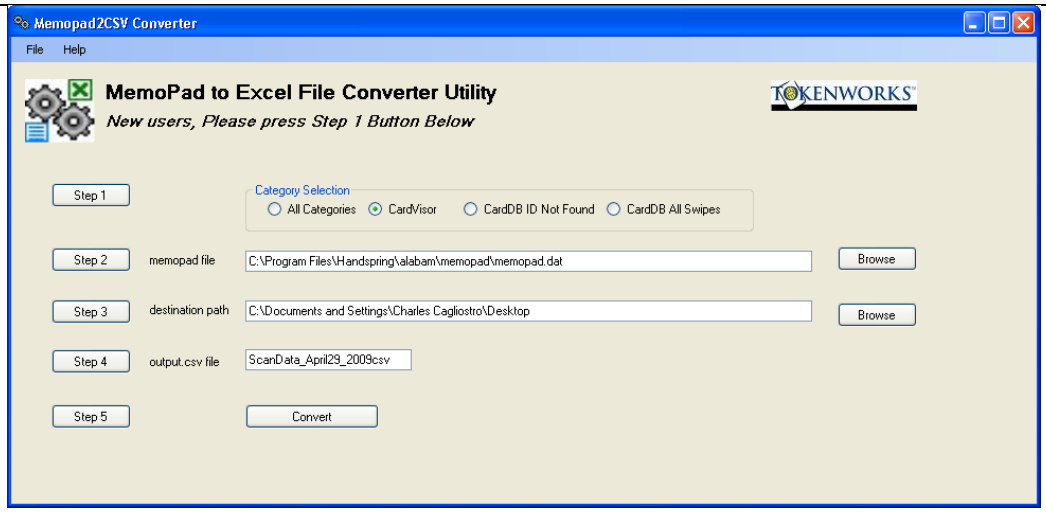


After you select the destination folder, the main screen of memopad2CSV will appear as:



___ If desired, change the name of the output file, making sure the file extension remains “csv” (Comma Separated Value).

In the example below, the output file is LatestData.csv. Remember, the “csv” file-type allows the file to be opened directly by Excel or other programs that open Comma Separated Value files.



___ Click Convert.

___ Wait for the confirmation screen to show.

___ Click OK.

___ Navigate to the directory where you saved your csv file.

___ Double-click on the csv file.

___ Verify that Microsoft Excel opens your csv file and that each field is in its own column.

Excel will automatically open the file IF you have associated Excel with *.csv files.

If Excel does NOT open the file (Excel is not associated with csv files), take the following steps.

___ Open Excel

___ Select File/Open from the main menu.

___ Navigate to your csv output csv file.

___ Click Open.

___ Verify that Excel opens the csv file and that each field is in its own column.

**csv* files will now be associated with Excel files; when you double-click a csv file, Excel will automatically load it.

___ You're done with exporting your data, skip to **Deleting Data from your ID Scanner**.

Method 2. Exporting data from a Mac or PC Palm Desktop – Original Method

The Palm Desktop application lets you export all or selected Memos in several common formats including comma delimited, tab delimited, and text. You should use text format since CardVisor puts field delimiters (^) in the data, which the import wizard of Excel and Access can recognize. The following instructions tell you how to do two things in order:

1. How to *extract and export* your Memo data into a text file, then,
2. How to *import* that text file into Microsoft Excel.

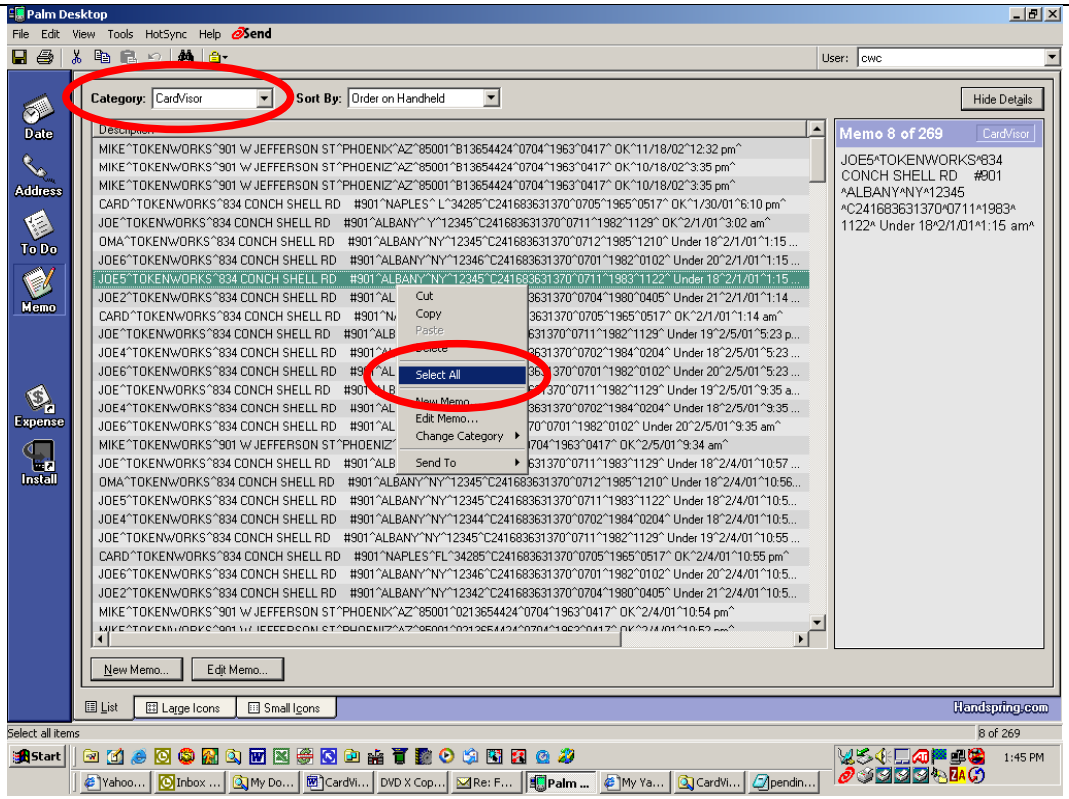
Important: Follow these steps carefully so that you get it right and avoid having to do it over. OK, let's get started.

1. How to extract and export your Memo data

___ Select the memos to be exported by highlighting the desired memos.

For example, follow the directions below to export just the Memos that are categorized with the "CardVisor" Category.

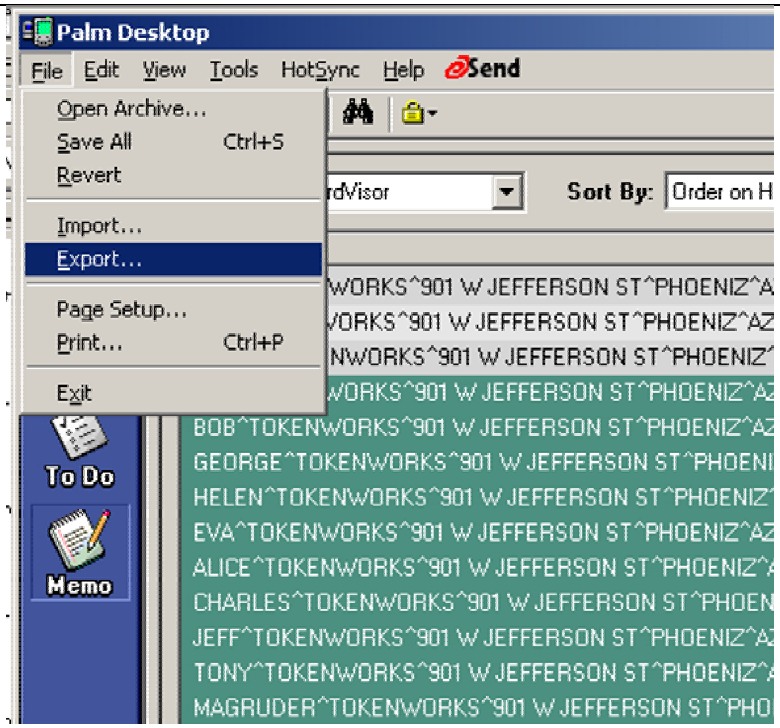
___ Set the Category to "CardVisor" - See Category box circled in RED.



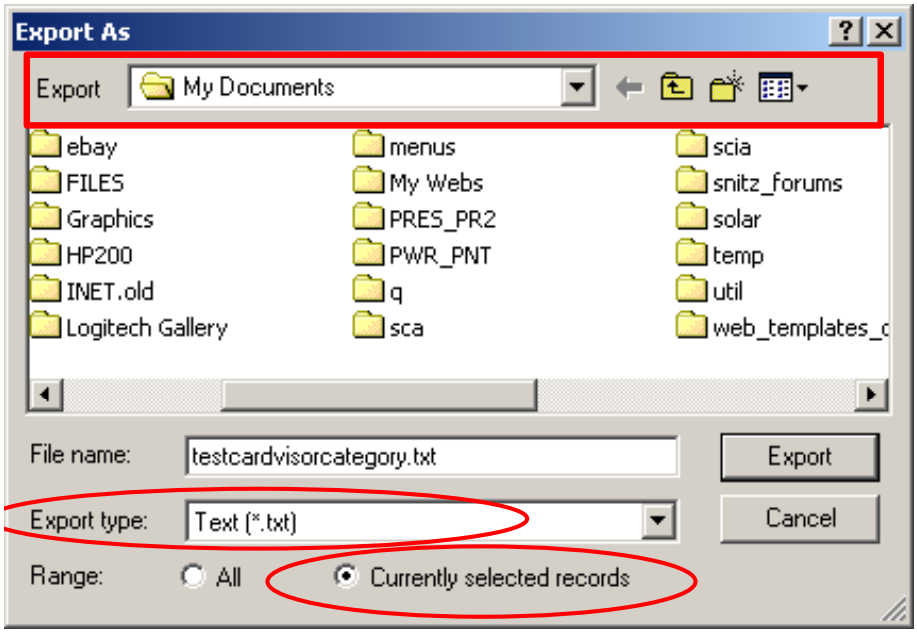
___ Place your cursor anywhere in the 'Description' window and right-click to open a drop-down menu as shown above.

___ Choose 'Select All', as shown above (red circle in middle).

___ From the main File menu, select Export as shown below.



This action will launch the Export dialog box shown below.



___ In the Export dialog box, select the file folder where you want to save the export file. (See top red rectangle.)

Use the Pull Down arrow if you want to change directories.

___ At File name, enter your file name. *(*We have used *testcardvisorcategory.txt* as shown above.)

NOTE: We recommend a file name that contains the scan-date(s) of the captured transaction data. (Examples: Saturday022809 or 022809.) This will help you identify the file later.

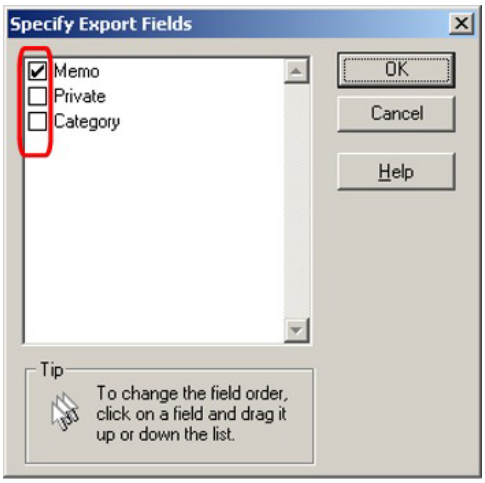
___ Set the Export type as **Text (*.txt). (**See 1st red circle above.)

Important: Verify that the file extension is " .txt" and not " .csv" since files with the "csv" file extension will not launch Excel's Import Wizard. If you accidentally use *csv*, change the *csv* file extension to *txt* via the file manager. No harm will be done.

___ Click the Range button for *Currently selected records.* (See 2nd red circle above.)

___ Click Export.

A dialog box will ask which field(s) of the Memo Pad should be exported, as shown below.



___ Notice the three fields in the Memo Pad application; *Memo, Private and Category*.

- *Memo* contains track data – **this is the data you want to export**.
- *Private* specifies whether the Palm OS should treat the record as private.
- *Category* specifies Memo category, i.e. CardVisor or raw data - not necessary to export.

___ Check *Memo* ONLY to export the track data.

___ Uncheck *Private.*

___ Uncheck *Category*.

___ Click OK.

After this window closes, the data will be exported and saved to the export file you specified. The Export complete message will display.

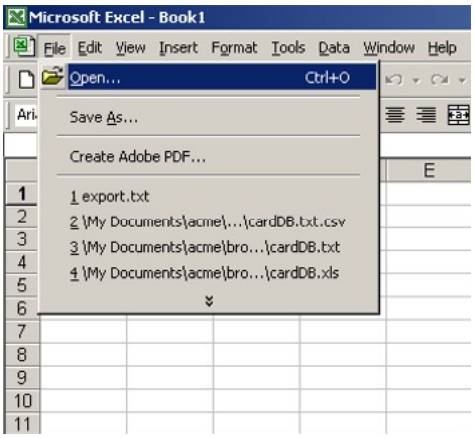
___ Click OK.

NOTE: At this point you have extracted and exported your MemoPad data as a .txt file. Now, you must continue with the next steps to *import* that data into Excel.

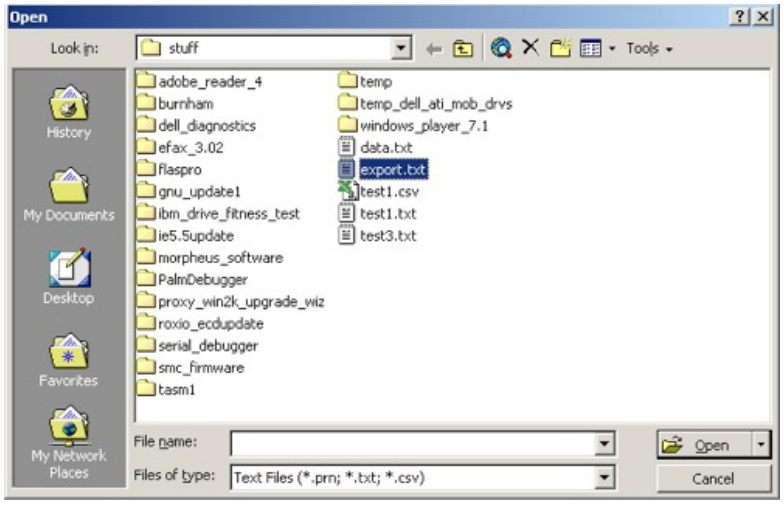
2. How to Import MemoPad Data to Microsoft Excel – The Original Method (cont'd)

The data exported from the Palm Desktop (see above) delimits fields with the carat character (^). Many 3rd party marketing firms prefer to receive contact data in Excel spreadsheet format. Also to create mailing labels using the provided mailing label application note (see White CardVisor CD), it is necessary to import the data to Microsoft Excel. For this example, Excel will be used because the mailing label application notes are based on it. However, both Excel and Access Import Wizards are the same.

___ Click File/Open as shown below.



The Open dialog box will display as shown below.



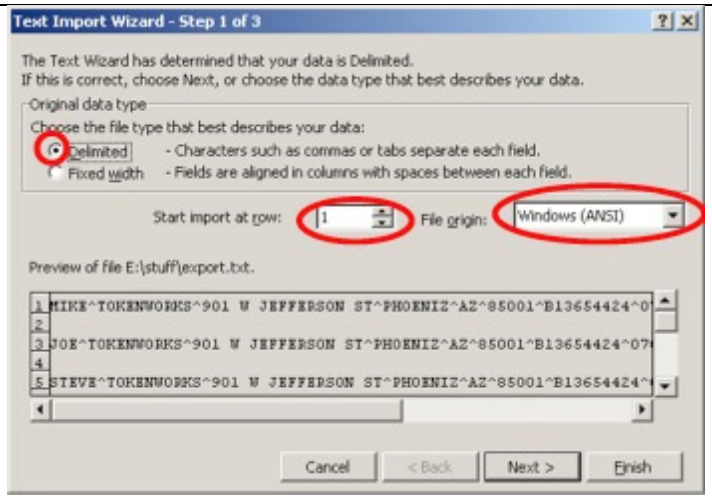
___ Select the directory that contains your exported MemoPad data.

___ Change File of type to Text Files (*.prn, *.txt, *cvs)

___ Select the correct file (in this example, export.txt) or type the correct file name into the File name text box.

___ Click Open.

This will launch the Excel Import Wizard as shown below. This Wizard lets you specify how Excel will import your data to the Excel spreadsheet. (Notice that the Wizard's blue title bar says, "Step 1 of 3." The following instructions will guide you through these 3 steps.


Text Import Wizard - Step 1 of 3
The Text Wizard has determined that your data is Delimited.
If this is correct, choose Next, or choose the data type that best describes your data.
Original data type
Choose the file type that best describes your data:
Delimited - Characters such as commas or tabs separate each field.
Fixed width - Fields are aligned in columns with spaces between each field.
Start import at row: 1
File origin: Windows (ANSI)
Preview of file E:\stuff\export.txt.
1 MIKE^TOKENWORKS^901 W JEFFERSON ST^PHOENIZ^AZ^85001^B13654424^0
2
3 JOE^TOKENWORKS^901 W JEFFERSON ST^PHOENIZ^AZ^85001^B13654424^07
4
5 STEVE^TOKENWORKS^901 W JEFFERSON ST^PHOENIZ^AZ^85001^B13654424^
Cancel
< Back
Next >
Finish

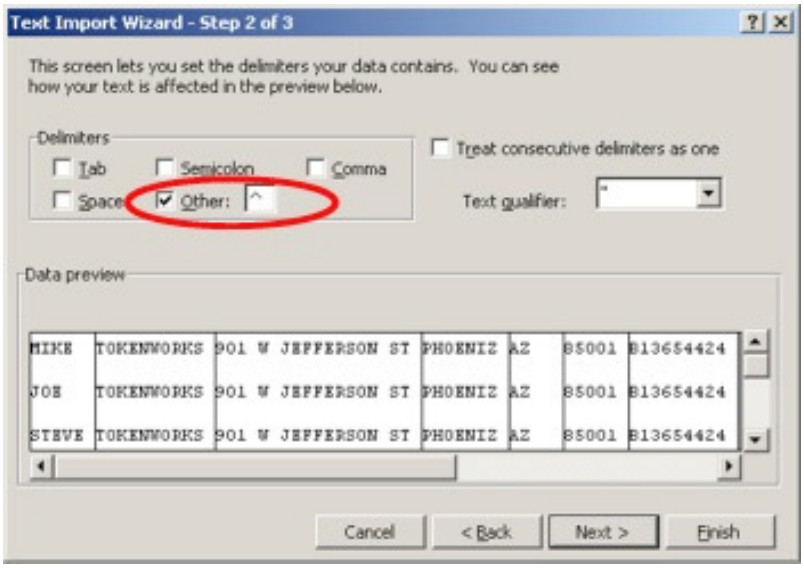
___ Click the Delimited radio button as shown (small red circle).

___ Select *Start import at row 1* (small red ellipse).

___ Select *File origin* as Windows (ANSI) (larger red ellipse).

___ Click Next.

This will launch the Wizard's Step 2 of 3 dialog box, shown below, which asks how fields are delimited.


Text Import Wizard - Step 2 of 3
This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.
Delimiters
Tab
Semicolon
Comma
Space
Other:
Treat consecutive delimiters as one
Text qualifier:
Data preview
MIKE TOKENWORKS 901 W JEFFERSON ST PHOENIZ AZ 85001 B13654424
JOE TOKENWORKS 901 W JEFFERSON ST PHOENIZ AZ 85001 B13654424
STEVE TOKENWORKS 901 W JEFFERSON ST PHOENIZ AZ 85001 B13654424
Cancel
< Back
Next >
Finish

___ IMPORTANT: Uncheck the *Tab*, *Space*, *Semicolon*, and *Comma* radio buttons.

___ Check *only* the 'Other' radio button as shown above.

___ Type a carat (^) into the 'Other' delimiter text box as shown above (red ellipse).

Note: When you enter the carat character, the Wizard will put vertical lines in the Data preview window so you can see how fields are separated.

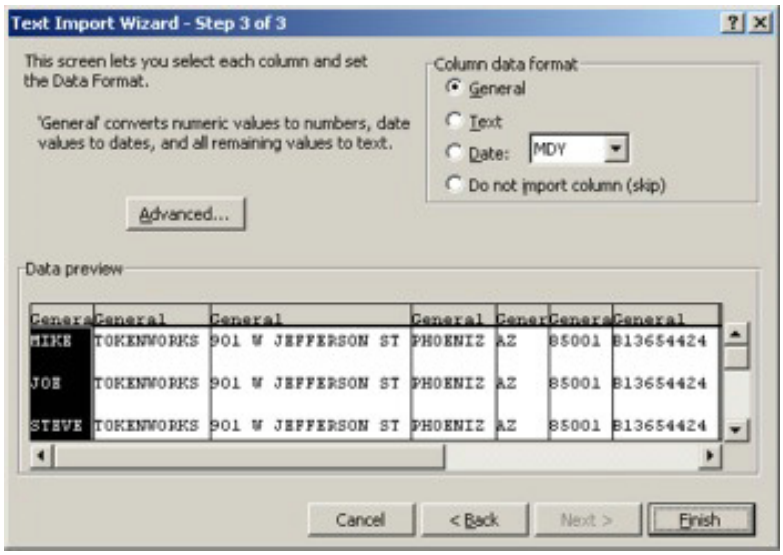
___ Verify that the vertical lines separate the fields properly.

If the lines do not show up in the correct places, verify that *only* the Other radio button is checked - and that all other radio buttons are unchecked.

If there are other errors in field separation, try again. Return to **Method 2. Exporting data from a Mac or PC Palm Desktop – Original Method**.

___ Click Next

This will launch the Wizard's Step 3 of 3 dialog box, as shown below, where you can specify the data format for each column.


Text Import Wizard - Step 3 of 3
This screen lets you select each column and set the Data Format.
'General' converts numeric values to numbers, date values to dates, and all remaining values to text.
Advanced...
Column data format
General
Text
Date:
MDY
Do not import column (skip)
Data preview
MIKE TOKENWORKS 901 W JEFFERSON ST PHOENIZ AZ 85001 813654424
JOE TOKENWORKS 901 W JEFFERSON ST PHOENIZ AZ 85001 813654424
STEVE TOKENWORKS 901 W JEFFERSON ST PHOENIZ AZ 85001 813654424
Cancel
< Back
Next >
Finish

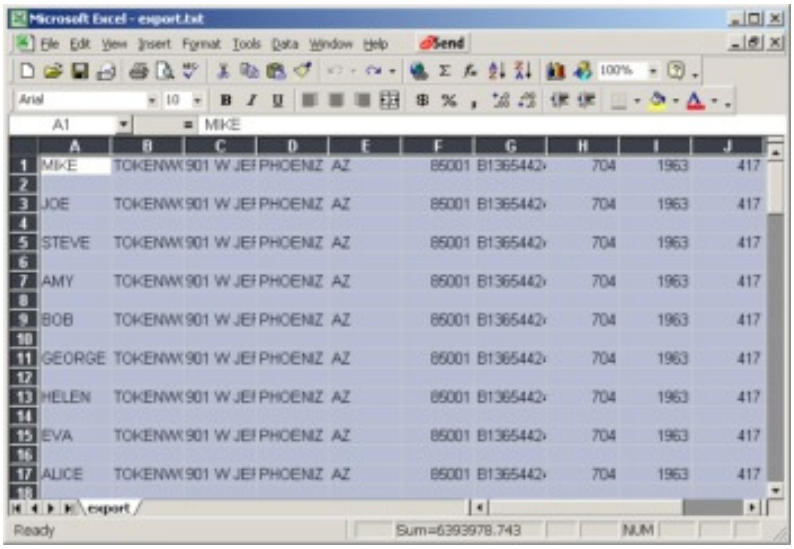
___ Notice that you can highlight a column of data and specify a format *(General, Text, Date,* or *Do not import)* for each column.

Note: For mailing labels, General is fine on all columns. If certain information should be treated differently, this screen lets you format it appropriately.

For our purposes, *General* will suffice.

___ Click Finish.

The data has now been imported into Excel. Shown below is what the imported data will look like in Excel.

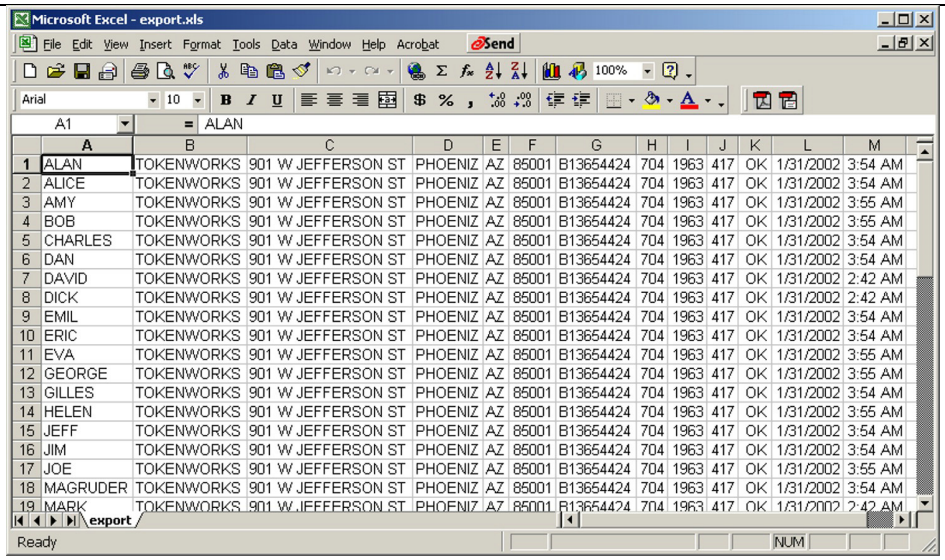

Microsoft Excel - export.txt
File Edit View Insert Format Tools Data Window Help
Send
Arial
A1
MIKE
A B C D E F G H I J
1 MIKE TOKENW 901 W JEI PHOENIZ AZ 85001 B1365442 704 1963 417
3 JOE TOKENW 901 W JEI PHOENIZ AZ 85001 B1365442 704 1963 417
5 STEVE TOKENW 901 W JEI PHOENIZ AZ 85001 B1365442 704 1963 417
7 AMY TOKENW 901 W JEI PHOENIZ AZ 85001 B1365442 704 1963 417
9 BOB TOKENW 901 W JEI PHOENIZ AZ 85001 B1365442 704 1963 417
11 GEORGE TOKENW 901 W JEI PHOENIZ AZ 85001 B1365442 704 1963 417
13 HELEN TOKENW 901 W JEI PHOENIZ AZ 85001 B1365442 704 1963 417
15 EVA TOKENW 901 W JEI PHOENIZ AZ 85001 B1365442 704 1963 417
17 ALICE TOKENW 901 W JEI PHOENIZ AZ 85001 B1365442 704 1963 417
export
Ready
Sum=6393978.743
NUM

Note: Each entry has its own row, with:

- First name in column A,
- Last name in column B,
- Address in column C, etc
- Also note that there are blank rows between each row. (We will remove those momentarily.)

___ To remove the empty rows in the data, click the Sort button. Or select Data/Sort to sort the entire spreadsheet.

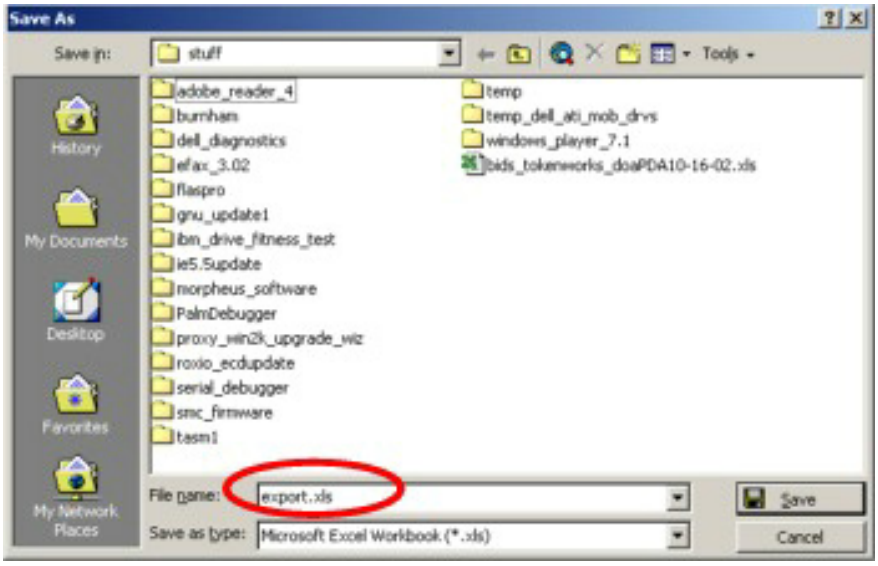
Here is the spreadsheet after you click the Sort button .



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	ALAN	TOKENWORKS	901 W JEFFERSON ST	PHOENIZ	AZ	85001	B13654424	704	1963	417	OK	1/31/2002	3:54 AM
2	ALICE	TOKENWORKS	901 W JEFFERSON ST	PHOENIZ	AZ	85001	B13654424	704	1963	417	OK	1/31/2002	3:54 AM
3	AMY	TOKENWORKS	901 W JEFFERSON ST	PHOENIZ	AZ	85001	B13654424	704	1963	417	OK	1/31/2002	3:55 AM
4	BOB	TOKENWORKS	901 W JEFFERSON ST	PHOENIZ	AZ	85001	B13654424	704	1963	417	OK	1/31/2002	3:55 AM
5	CHARLES	TOKENWORKS	901 W JEFFERSON ST	PHOENIZ	AZ	85001	B13654424	704	1963	417	OK	1/31/2002	3:54 AM
6	DAN	TOKENWORKS	901 W JEFFERSON ST	PHOENIZ	AZ	85001	B13654424	704	1963	417	OK	1/31/2002	3:54 AM
7	DAVID	TOKENWORKS	901 W JEFFERSON ST	PHOENIZ	AZ	85001	B13654424	704	1963	417	OK	1/31/2002	2:42 AM
8	DICK	TOKENWORKS	901 W JEFFERSON ST	PHOENIZ	AZ	85001	B13654424	704	1963	417	OK	1/31/2002	2:42 AM
9	EMIL	TOKENWORKS	901 W JEFFERSON ST	PHOENIZ	AZ	85001	B13654424	704	1963	417	OK	1/31/2002	3:54 AM
10	ERIC	TOKENWORKS	901 W JEFFERSON ST	PHOENIZ	AZ	85001	B13654424	704	1963	417	OK	1/31/2002	3:54 AM
11	EVA	TOKENWORKS	901 W JEFFERSON ST	PHOENIZ	AZ	85001	B13654424	704	1963	417	OK	1/31/2002	3:55 AM
12	GEORGE	TOKENWORKS	901 W JEFFERSON ST	PHOENIZ	AZ	85001	B13654424	704	1963	417	OK	1/31/2002	3:55 AM
13	GILLES	TOKENWORKS	901 W JEFFERSON ST	PHOENIZ	AZ	85001	B13654424	704	1963	417	OK	1/31/2002	3:54 AM
14	HELEN	TOKENWORKS	901 W JEFFERSON ST	PHOENIZ	AZ	85001	B13654424	704	1963	417	OK	1/31/2002	3:55 AM
15	JEFF	TOKENWORKS	901 W JEFFERSON ST	PHOENIZ	AZ	85001	B13654424	704	1963	417	OK	1/31/2002	3:54 AM
16	JIM	TOKENWORKS	901 W JEFFERSON ST	PHOENIZ	AZ	85001	B13654424	704	1963	417	OK	1/31/2002	3:54 AM
17	JOE	TOKENWORKS	901 W JEFFERSON ST	PHOENIZ	AZ	85001	B13654424	704	1963	417	OK	1/31/2002	3:55 AM
18	MAGRUDER	TOKENWORKS	901 W JEFFERSON ST	PHOENIZ	AZ	85001	B13654424	704	1963	417	OK	1/31/2002	3:54 AM
19	MARK	TOKENWORKS	901 W JEFFERSON ST	PHOENIZ	AZ	85001	B13654424	704	1963	417	OK	1/31/2002	2:42 AM

___ Click File/Save to save your new Excel spreadsheet.

This will launch the Save As dialog box shown below.



___ Enter your desired File name and Save as type.

In the example shown above,

- Save as file type is Microsoft Excel Workbook (*.xls), (red ellipse), and
- File name is 'export.xls.'

___ You're done with exporting your data, skip to **Deleting Data from your ID Scanner**

Deleting Data from your ID Scanner

Verify your data first!

Before you delete the data on your ID Scanner, you must verify that you

- Downloaded *all* the ID Scanner data to your Palm Desktop AND
- Exported your ID Scanner data to a text file as described above. Here's how to verify:

___ Open the exported file with a text editor such as Notepad (part of Windows), and,

___ Verify that the first and last lines in the exported file match the first and last memos in the ID Scanner's MemoPad application.

If they match, congratulations! It is now safe to delete the data in your ID Scanner. Proceed to **Two ways to delete data from your ID Scanner.**

If your data doesn't verify

___ If the first and last lines in the exported file do NOT match the first and last memos in the ID Scanner's MemoPad application there's an error somewhere. Do NOT delete the data from your ID Scanner!

___ Make sure you exported all the data properly before you delete the data from the ID Scanner.

Either:

- Your data didn't get *exported* properly in, or,
- Your data didn't get *imported* properly.

___ Check the export file created in **1. How to extract and export your Memo data.**

___ If there is NO data:

- You may need to re-HotSync at **Synchronize your ID Scanner with your computer**, or,
- You may need to re-import at **1. How to extract and export your Memo data**

___ If there IS data, you must redo **2. How to Import MemoPad Data to Microsoft Excel – The Original Method (cont'd).**

Two ways to delete data from your ID Scanner

There are two ways to delete the data from the ID Scanner. (Instructions below.)

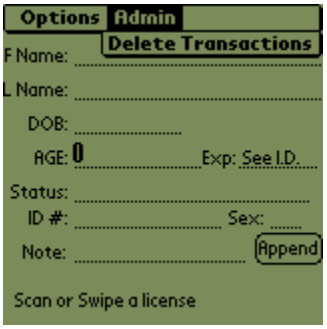
1. Delete the data directly on the ID Scanner via built in menu (easiest way to delete if you don't want to download your ID Scanner data to your PC), or
2. Use the Palm Desktop & HotSync manager.

Here are the instructions for both ways:

1. Deleting Data directly on ID Scanner

___ Tap on *CardVisor* on the top left corner of the main CardVisor screen.

___ From the menu options select Admin/Delete Transactions as shown below.



___ Follow the prompts.

___ If you downloaded your ID Scanner transactions to your Palm Desktop, also delete them from your Palm Desktop – or they will reappear during the next HotSync!

2. Deleting Data via Palm Desktop using HotSync Manager

Us this approach if you plan to download the ID Scanner data to your Palm Desktop as it will ensure the PC and the ID Scanner transaction logs stay in sync.

___ Open the Palm Desktop Application.

___ Select the HotSync user name for the ID Scanner you want to delete data from.

If you have multiple HotSync names for the same PDA, select the one used during the last HotSync.

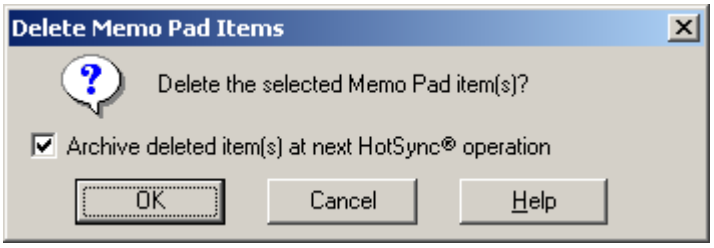
___ Select the MemoPad icon (left side of screen).

You will see the Memos appear on the main screen.

___ Highlight the Memos you want to delete. (Select Edit Menu/All, or click one Memo, hold down the mouse key, and drag down across the Memos you want to delete.)

___ Select Edit Menu/Delete or hit the Del key on your keyboard.

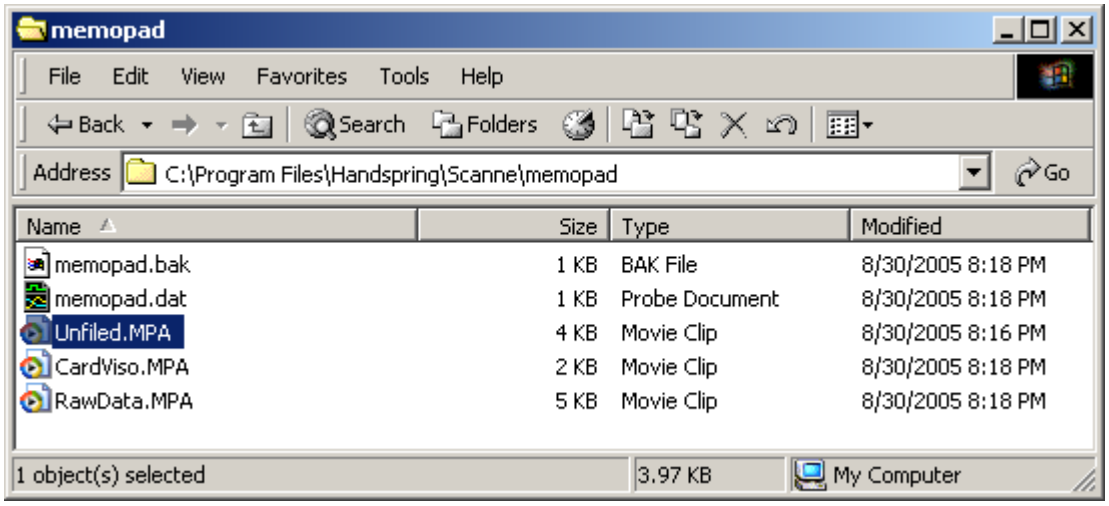
The following dialog box will appear.



___ If you have NOT EXPORTED your data to a text file, check *Archive deleted items at next HotSync*. If you HAVE EXPORTED your data to a text file, uncheck *Archive deleted items at next HotSync*. (See above dialog box.)

___ Perform another HotSync with the ID Scanner – use the same HotSync name used above.

This will erase the data on your ID Scanner. If you checked *Archive deleted items at next HotSync*, then the software will create MemoPad Archive (MPA) files (*CardViso.MPA* & *RawData.MPA*) in the MemoPad directory for that HotSync name. See below.


memopad
File Edit View Favorites Tools Help
Back Search Folders
Address C:\Program Files\Handspring\Scanne\memopad
Go
Name Size Type Modified
memopad.bak 1 KB BAK File 8/30/2005 8:18 PM
memopad.dat 1 KB Probe Document 8/30/2005 8:18 PM
Unfiled.MPA 4 KB Movie Clip 8/30/2005 8:16 PM
CardViso.MPA 2 KB Movie Clip 8/30/2005 8:18 PM
RawData.MPA 5 KB Movie Clip 8/30/2005 8:18 PM
1 object(s) selected
3.97 KB
My Computer

If you mistakenly deleted your MemoPad data, you can recover the last set (only) of deleted data by using these **.MPA* files. You can open these archive files with the Palm Desktop software and merge them with an existing MemoPad transaction list. See the Palm Desktop software user manual for details.

Encoded Stripe (Magnetic & Bar Code) – Formats & Reliability

Formats

The CardVisor ID Scanner reads encoded information off the encoded (magnetic or 2D bar code) stripe of drivers license or ID card.

While most states have the same basic information on the encoded stripe, the locations and format differ. From time to time, states will change how they encode the information on the stripe. Also, since most do not read what they've encoded, they sometimes make mistakes that become part of the issued-card population. This may cause difficulty in parsing the data.

When the software is unsure, it creates a memo in the MemoPad application that starts with the phrase "**Trouble Parsing this data ->…**"

If you see a Memo like this, then please email it to support@tokenworks.com or email the entire MemoPad file (*MemoPad.dat*) and you will be one of the first to receive a software update that addresses this new license format.

Reliability

Driver licenses are exposed to varying conditions in a typical 4 to 6 year life cycle. Unlike credit cards, Driver licenses are not frequently swiped nor are they typically replaced if the encoded stripe is damaged. Therefore, scan-performance will vary with older licenses in poorer condition.

For licenses with Magnetic stripes, *it is possible to read only Track 2 of a license since it is encoded at a lower bit density than tracks 1 and 3*, and less sensitive to damage. Track 2 has the driver's license number, date of birth and expiration date. If the name does not appear on the screen, it is possible that Track 1 is unreadable while track 2 is still readable. **Note:** The software must be able to read track 2 information to display the age and card status.

For licenses with 2D bar codes, verify that the bar code is not damaged and that all foreign material is removed before reading. The level of error correction incorporated into the bar code varies between states so some states will scan with quite a bit of damage while others will fail with minor damage.

Age Verification Calculation Limitations

The CardVisor application is warranted to read the date of birth information encoded on the machine-readable (magnetic or 2D bar code) stripe and display the current age based on current date/time information contained in the handheld computers real time clock (RTC). It will also read other information on the stripe and present it to the operator. It should be understood that the displayed age may differ from the actual age of the person presenting the card for any one of a number of reasons. Among the most likely are:

- The card does not belong to the person presenting it,
- The encoded machine-readable stripe has been altered,
- The date of birth presented to the issuing authority was misrepresented,
- The issuing authority mis-encoded the date of birth on the card,
- The handheld computer real time clock is not set to the current date/time.

The above list of reasons is not exhaustive.

State and Local Privacy Laws, Ordinances or Rules

Some states and local government units regulate whom, how and what information from a driver's license can be electronically viewed or recorded. Check with the authorities in your jurisdiction before using the CardVisor product. Purchaser is wholly responsible for insuring full compliance with the laws of the jurisdiction wherein the product is to be used. TokenWorks fully disclaims any liability for any loss, damages or untoward circumstances that may arise from the inappropriate use of the product or of the data retrieved through its use.

Document Information

EVOLUTION OF THIS DOCUMENT			
Version	**Date**	**Author**	**Evolution**
UM-032107-CC-R0	03/21/2007	CC	Initial Release – Updated Palm Desktop installation section of CardVisor Software manual
UM-032107-CC-R1	06/28/2007	CC	Added ListMaker and MemoPad2CSV sections
UM-032107-CC-R2			(No data)
UM-032107-CC-R3	03/15/09		Update/reorganize/reformat in checklist format
UM-032107- CC-R4	4/1/09	CC	Reformatted to checklist format, moved VIP/Banned List to new document, expanded MemoPad2CSV section.
UM-032107- CC-R5	5/1/09	CC	Updated for MemoPad2CSV 1.2 which works with Palm Desktop ver 6.2
UM-032107- CC-R6	7/15/09	CC	Clarified MemoPad2CSV installation directions & MemoPad2CSV usage instructions
UM-032107- CC-R6	1/15/09	CC	Formatting / Color Changes

Appendix

HotSync Troubleshooting

For the latest illustrated troubleshooting tips for HotSync see:
http://www.idscanner.com/help/HotSyncIssues.htm

How to Reinstall the CardVisor Software

IDVisor Z22 Mobile/CounterTop/MSR

Your ID Scanner comes with the CardVisor software installed in memory. If the software has been erased or compromised, you must reinstall/update the software in one of two ways described below:

___ If you have previously HotSynced your ID Scanner, simply HotSync again and when prompted, select the previous Hotsync name to automatically reinstall the software.

OR

___ If you have NOT previously HotSynced your ID Scanner:

___ Download the software from our Support Downloads section – see instructions at http://www.idscanner.com/support/Download.htm AND,

___ Use the Palm Desktop Install Tool to install the software on your ID Scanner via the Hotsync Process.

Once the Hotsync process completes, the software will be installed.

If you tap on the icon, the program will launch, but it is quicker if you associate the buttons on the front panel of the Palm with the CardVisor application and the MemoPad application. You can do this by:

___ Select the Prefs icon and,

___ Tap on the buttons item to associate these programs with the buttons.

CardVisor II, III, IV – Edge, BC, BC-Pro

The CardVisor software comes pre-installed in the CardTool Magnetic Card reader (Black Plastic Magnetic Card Reader inserted into expansion slot of Handspring Computer).

In the highly unlikely event the software has been erased or compromised, you must reinstall the software as follows:

___ Download the software from our Support Downloads section – see instructions at http://www.idscanner.com/support/Download.htm AND,

___ Use the Palm Desktop Install Tool to install the software on your ID Scanner via the Hotsync Process.

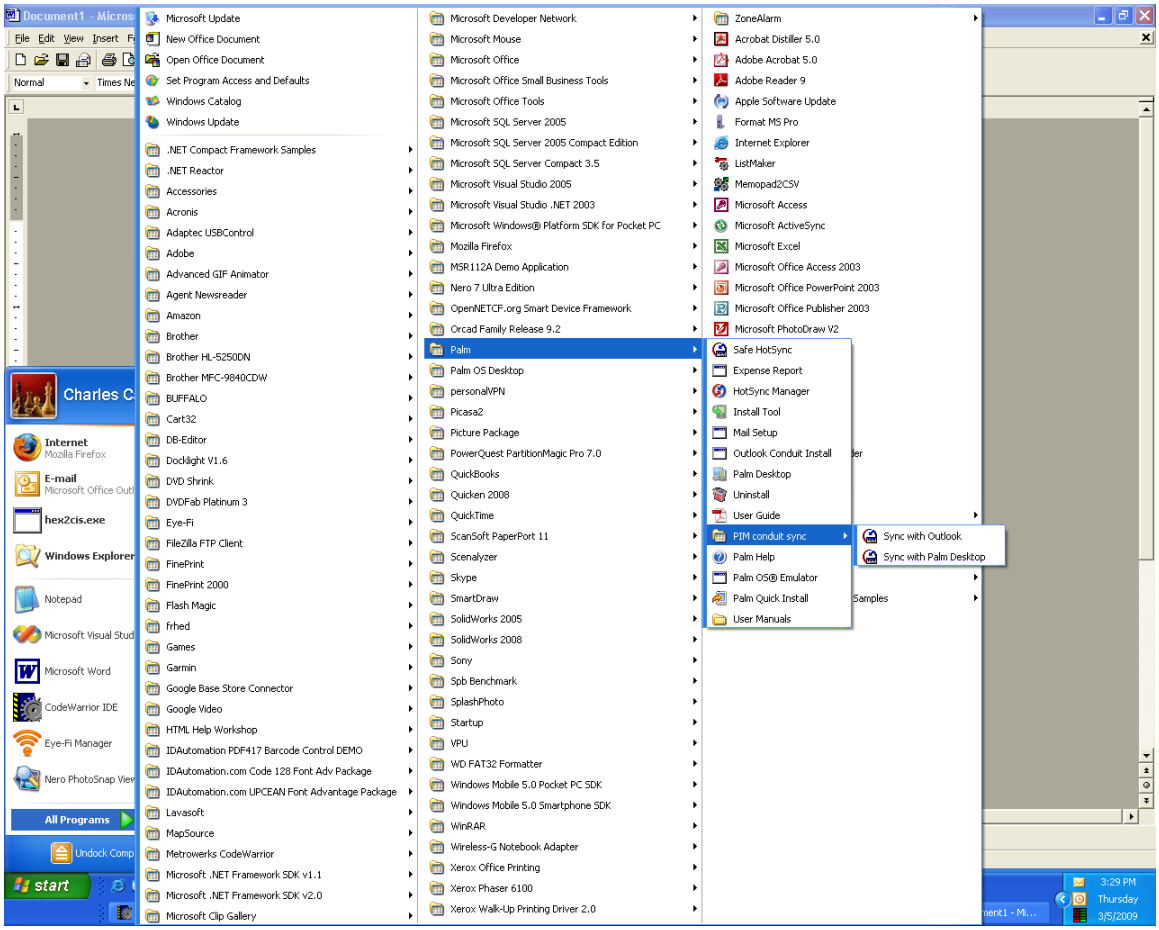
___ Run the updater software on the Palm computer.

The updater software will program the flash memory of the CardTool reader and install new software.

How to Remove Outlook as the Default HotSync Program

___ Open the Palm Folder.

___ Open the PIM Conduit Sync folder and notice that two options display, “Sync with Outlook” and “Sync with Palm Desktop” as shown below.



___ Select the Sync with “Palm Desktop” Option.

___ Then perform another HotSync.

___ Verify that your data appears in the Memos section.

If you want further information about Switching between Outlook and Palm Desktop synchronization, visit Palm’s site at http://kb.palm.com/SRVS/CGI-BIN/WEBCGI.EXE?New,kb=PalmSupportKB,t=ooccase,case=obj(25263)

Table 1. Palm Desktop vs. PC Operating System

Palm Desktop Version by Palm Device/PC Operating System			
Device	**Operating System**	**Palm Desktop**	**Comments**
Palm Z22 *(IDVisor Z22 Mobile, CounterTop, MSR)*	Win98, Win2000, WinXP, MAC	Version 4.14	Palm Desktop Version 4.14 works great on Win2000 and WinXP
	Win ***VISTA***	Palm Desktop Version 4.14 or Version 6.2	Palm Desktop Version 4.14 installs on some ***Vista*** machines and if it works, great. If Palm Version 4.14 fails, then install palm Version 6.2. NOTE: Since MemoPad2CSV does not work with Palm Desktop Version 6.2, you must use the original or manual export process detailed in this manual to convert data from Palm Desktop to a comma separated value (csv) file. (As of this date 4/9/2009 this is true, but we have started work on making memopad2CSV compatible with the Palm Desktop 6.2 so please visit http://idscanner.com/help/HotsyncIssues.htm and check for an update.)
Handspring Visor *(Deluxe, Edge, Pro)*	Win98, Win2000, WinXP	Palm Desktop Version 4.01 or 4.14	Palm Desktop 4.14 does not officially support Handspring devices, but we and our customers have found Version 4.14 works great and is actually faster and more robust than 4.01.
	Win ***VISTA***	Try Palm Desktop Version 4.14 but ***Vista*** is not supported.	Palm Desktop Version 4.14 installs on some ***Vista*** machines and if its works, great. If not, you have two choices. Move to another PC with WinXP/Win2000 or try to down grade to WinXP/Win2000. Try to install 4.01 on ***Vista*** see below.

If you have any problems with HotSync, see **HotSync Troubleshooting** and/or check our Help page at: http://www.idscanner.com/help/

Limited Warranty - CardTool® reader and/or CardVisor® software

TokenWorks™ Inc. (hereafter "TokenWorks") warrants the TokenWorks CardTool® reader, the CardVisor® software, and this Manual, hereafter jointly or individually the "product" IN ITS ENTIRETY, to be in good working order for a period of 90 days from the date of purchase. Should this product fail to be in good working order at any time during this warranty period, TokenWorks will, at its option, repair or replace this product at no additional charge except as set forth below. Repair parts and replacement products will be furnished on an exchange basis and will be either reconditioned or new. All replaced parts and products become the property of TokenWorks. This limited warranty does not include service to repair damage to the product resulting from accident, disaster, misuse, abuse, or modification of the product performed without the prior written approval of TokenWorks.

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